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United States
Department of
Agriculture

Economic
Research
Service

TS-180

June 1982

Tobacco

OUTLOOK & SITUATION

NOTICE

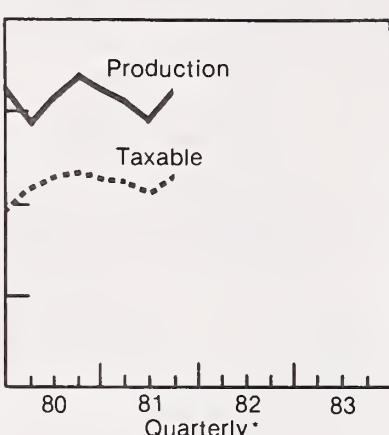
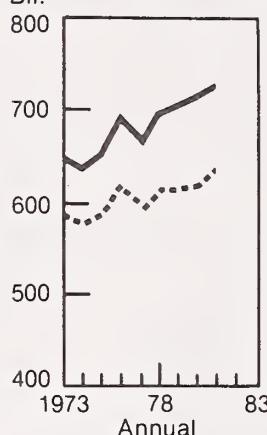
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Tobacco Outlets

Trends in U.S. Manufactured Products and Exports

Cigarettes Production and Taxable Removals

Bil.



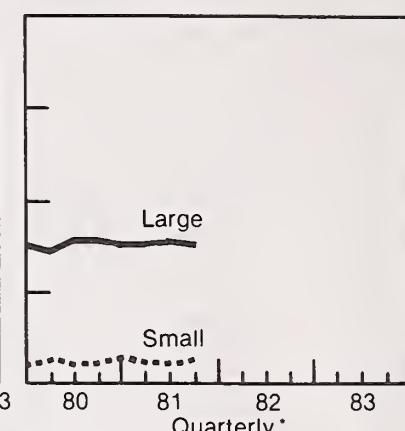
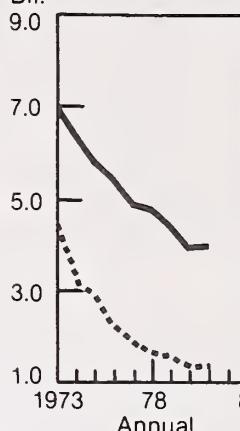
Last quarter shown estimated.

*Seasonally adjusted at annual rates.

Neg. ERS 229-82(6)

Cigars and Cigarillos Production

Bil.



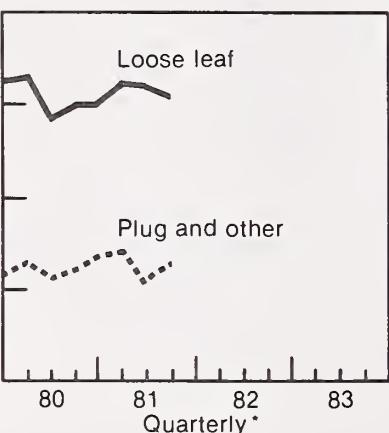
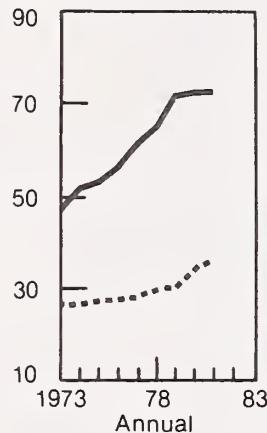
Last quarter shown estimated.

*Seasonally adjusted at annual rates.

Neg. ERS 229-82(6)

Chewing Production

Mil. lb.



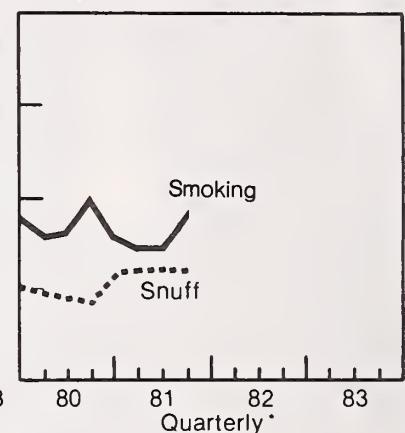
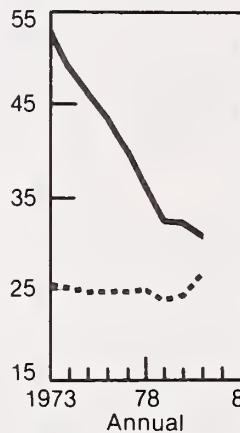
Last quarter shown estimated.

*Seasonally adjusted at annual rates.

Neg. ERS 229-82(6)

Smoking and Snuff Production

Mil. lb.



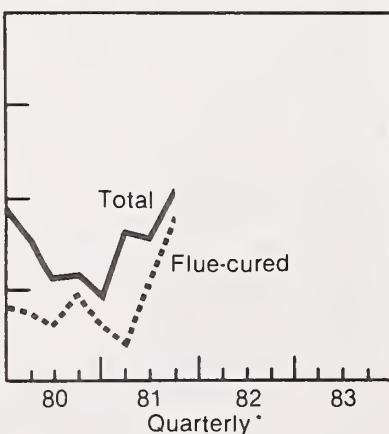
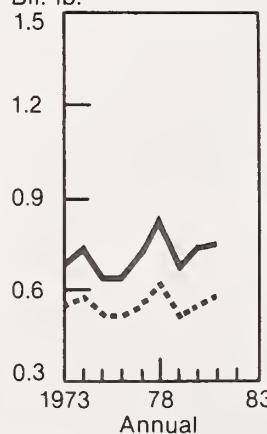
Last quarter shown estimated.

*Seasonally adjusted at annual rates.

Neg. ERS 229-82(6)

Leaf Exports, Farm-Sales Weight

Bil. lb.



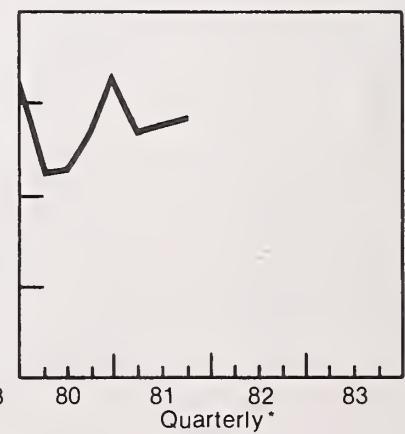
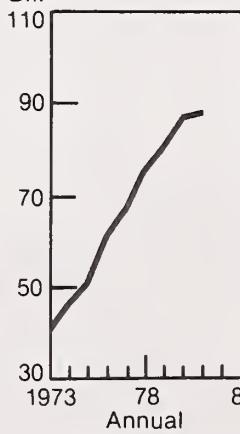
Last quarter shown estimated.

*Seasonally adjusted at annual rates.

Neg. ERS 229-82(6)

Cigarette Exports

Bil.



Last quarter shown estimated.

*Seasonally adjusted at annual rates.

Neg. ERS 229-82(6)

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Principal contributor:
Verner Grise
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National Economics Division
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Personnel Change Tobacco Situation

Verner N. Grise is currently the principal coordinator of USDA's *Tobacco Situation*.

Robert H. Miller, who had been responsible for USDA's tobacco supply, demand and price research since 1968 has become Tobacco and Peanuts Group Leader, Analysis Division, Agricultural Stabilization and Conservation Service. (Phone 202 447-8839).

Summary

Stocks To Rise This Season, But New Crop Likely To Decline

Total use of U.S. tobacco this season will likely rise about 5 percent because of larger exports. Even so, use is expected to be 10 percent below 1981's large crop, so stocks carried over to the new marketing year (July 1 for flue-cured and October 1 for burley and other kinds) will likely increase from last year's 3.3 billion pounds.

Supplies are expected to decline next marketing year because a smaller 1982 crop will likely offset larger beginning stocks. If acreage is near the February planting intentions and yields are average, the crop would be about 10 percent below 1981's 2.07 billion pounds. With a smaller crop and an almost 11-percent increase in the price support level, auction prices will likely be higher in 1982. Exports could drop because world consumption is expected to be stable, and the U.S. dollar will likely remain strong relative to major foreign currencies.

February planting intentions point to 8 percent less flue-cured acreage than last year. With average growing conditions, the crop would total about 990 million

pounds—off a sixth from last year. So, the total supply for 1982/83 (estimated carryover stocks plus the projected 1982 crop) may drop by about 120 million pounds or about 4 percent. Even with lower exports next year, the smaller crop and higher price support will likely increase prices and decrease loan receipts. USDA's Crop Production Report, scheduled for release on July 12, will include flue-cured production forecasts by State for all types combined, based on surveys conducted around July 1. For burley, growers planned a 1-percent acreage cut for 1982. So at this point, burley production next season appears likely to total about the same as the 1981 crop.

Cigarette consumption for the year ending June 30 was up slightly. While per capita use was down, the adult population was larger. Cigarette exports are off a little, so output for 1981/82 may about equal the 728 billion cigarettes produced last season. However, cigarette production is expected to fall slightly in the second half of calendar 1982, compared with a year earlier. Domestic use may remain steady or drop slightly in the second half because of higher State cigarette taxes. For

1981/82, cigar production is down, as is plug chewing tobacco. Output is up for snuff and loose leaf chewing tobacco.

Unmanufactured tobacco exports during July 1981-April 1982 were 6 percent above a year earlier. With a larger crop of higher quality, shipments for the marketing year will likely exceed last year's 553 million pounds (664 million, farm sales weight).

Flue-cured exports in the first 10 months of 1981/82 ran 3 percent above a year earlier. Exports to most Asian countries rose because of the higher quality crop, but European countries took less. For the marketing year, about 375 million pounds (530 million, farm sales weight) will likely be exported, 4 percent more than a year earlier. Burley exports for fiscal 1982 will rise sharply from last year's 73 million pounds (108 million, farm sales weight).

During July 1981-April 1982, imports for consumption of unmanufactured tobacco and customs category 170.8045 (tobacco manufactured or not manufactured, not specially provided for) were down from a year earlier. U.S. manufacturers' stocks of imported cigarette tobacco on April 1 were higher than a year earlier because stocks of both Oriental and burley rose. Cigar leaf stocks stayed about the same.

Despite about the same cigarette output as last year, manufacturers' use of domestic flue-cured may rise a little this year. With larger exports, the total disappearance of flue-cured tobacco may climb 6 percent from last year's 1.04 billion pounds. Disappearance remains below

1981 production, so July 1 stocks will exceed last year's 2.01 billion pounds. Next year, stocks could be reduced because the 1982 crop is expected to fall short of use.

Larger exports will likely push this year's burley use above last season's 583 million pounds—to about the levels of the previous 5 years. Despite the rise, use is well below marketings, so October 1 stocks will likely build from last year's 1 billion pounds. Growers are expected to produce and market the same size crop this year as last, further boosting stocks.

Opening dates for the flue-cured auctions will be recommended to USDA in late June, and sales may start in mid-July. By April 15, growers had designated 98 percent of their marketable quota to auction warehouses where they want to sell their crop. To receive price support, growers must plant within the acreage allotment and certify that they did not use DDT, TDE, toxaphene, or endrin on their crops.

Auctions for type-32 tobacco sold in Maryland began March 16 and ended May 6. Prices in the State averaged \$1.74 a pound, 5 cents more than a year earlier. Prices for all Maryland tobacco produced in the United States dropped 14 cents, averaging \$1.55 a pound. Disappearance may fall below last season.

The use of fire-cured tobacco is declining, and supplies for next season will likely be a little higher than this year's. Dark air-cured supplies will be about the same as a year earlier. Use of cigar leaf is declining, but the smaller crop projected for 1982 will keep next season's stocks about the same as this year's.

Tobacco Situation

TOBACCO PRODUCTS

Cigarette Use Rises Slightly

Cigarette consumption is up a little. Reduced per capita use has offset the larger adult population. U.S. manufacturers shipped about 1 percent more cigarettes for domestic use during July 1981-March 1982 as in the comparable period in 1980/81. U.S. consumption during 1981/82 may have increased slightly from last year's 637 billion cigarettes (table 1), but use will likely remain steady or fall slightly during July-December 1982, compared with a year earlier, because of increases in excise taxes and manufacturers' selling prices.

Total output in 1981/82 is estimated at 728 billion cigarettes, about the same as last year. This total includes about 94 billion cigarettes for exports and overseas shipments. Through April, exports were a little lower than a year earlier. Although the European Community (EC) has seen a growing preference for U.S. cigarettes over the last decade, a number of countries have shifted to locally produced cigarettes under license arrangements whereby American brands are produced by local companies (table 2).

Manufacturers raised cigarette prices by a record 1 dollar per 1,000 cigarettes in February 1982. Prices are expected to rise further this year because of higher costs

for tobacco and other inputs. However, during the last 5 years, cigarette prices have risen slower than the price index for all consumer items. As estimated by State tax data, unit cigarette sales during January-March 1982 were up 0.7 percent from a year earlier.

Table 1—U.S. cigarette exports to leading destinations, 1980-82

Country	January-April ¹			
	1980	1981 ¹	1981	1982
Billions				
Belgium Luxembourg	18.4	18.2	5.5	6.7
Hong Kong	7.6	8.3	2.7	2.3
United Arab Emirates	4.4	3.6	1.6	.2
Netherlands	4.0	4.3	1.8	1.8
Antilles	4.2	5.2	1.9	2.0
Saudi Arabia	3.6	5.2	1.6	1.6
Japan	3.6	5.2	.7	.4
Kuwait	2.4	.9	.3	.4
Spain	3.2	1.7	1.2	.3
Canary Islands	2.4	1.7	.6	.5
Columbia	28.2	28.3	11.9	11.3
Other				
Total	82.0	82.6	29.8	27.5

¹Subject to revision. Compiled from publications and records of the Bureau of the Census

Table 2—Cigarettes: U.S. output, removals, and consumption, 1972-82

Year	Removals Tax-exempt						Estimated inventory increase	Total U.S. consump- tion ³
	Output	Taxable	Total	Exports	Shipments ¹	Overseas forces ²		
Billions								
1972	599.1	551.0	49.0	34.6	2.1	12.3	-3.3	566.8
1973	644.2	590.3	55.9	41.5	2.0	12.4	13.1	589.7
1974	635.0	576.2	59.2	46.9	1.9	10.4	-12.1	599.0
1975	651.2	588.3	62.3	50.2	1.5	10.6	-7.7	607.2
1976	693.4	617.9	72.1	61.4	1.9	8.8	13.5	613.5
1977	665.9	592.0	78.1	66.8	1.1	10.2	-14.4	617.0
1978	695.9	614.2	85.1	74.4	1.2	9.6	8.2	616.0
1979	704.4	614.0	93.8	79.7	1.1	13.0	5.7	621.5
1980 ⁴	714.1	620.5	94.2	82.0	1.0	11.2	2.3	631.5
1981 ⁵	734.7	636.1	92.0	82.6	1.0	8.4	5.0	640.0
Year ending June 30—								
1972	592.6	542.6	50.2	32.8	2.2	15.2	-8.5	566.4
1973	615.6	562.7	52.2	38.3	2.3	11.6	-2.2	576.8
1974	652.0	594.9	59.1	44.9	2.0	12.2	12.2	595.0
1975	626.8	570.3	57.4	46.6	1.7	9.1	-21.7	601.0
1976	688.2	619.1	69.8	58.2	1.9	9.6	14.0	615.0
1977	671.7	596.3	74.1	62.8	1.3	10.0	-9.7	616.5
1978	685.4	609.6	81.5	69.4	1.0	11.1	3.0	618.0
1979	707.0	615.2	92.2	78.8	1.2	12.2	12.1	616.0
1980	697.0	605.8	93.2	82.9	1.3	9.0	-7.2	622.0
1981 ⁴	727.8	631.4	92.0	83.0	1.0	10.0	2.0	637.0
1982 ⁵	728.0	635.0	93.5	80.0	1.0	12.5	5.5	642.0

¹To Puerto Rico and other U.S. possessions. ²Includes ship stores and small tax-exempt categories. ³Taxable removals, overseas forces, inventory change and imports (negligible). ⁴Subject to revision. ⁵Estimated.

Table 3—Cigars and smoking tobacco: Output, removals, and consumption, 1979-82

Year and item	United States factories		From Puerto Rico, taxable	Imports	Exports	Total U.S. consumption ¹
	Output	Removals				
	Taxable	Tax-exempt				
<i>Millions</i>						
Large cigars and cigarillos						
1979	3,601	3,353	179	842	107	177
1980	3,454	3,291	201	590	119	³ 200
1981 ²	3,428	3,258	160	534	124	81
Year ending June 30						
1979	3,703	3,478	167	961	99	178
1980	3,411	3,300	188	667	106	³ 190
1981	3,506	3,289	187	558	133	³ 200
1982 ²	3,435	3,150	150	535	115	170
<i>Million pounds</i>						
Smoking tobacco						
1979	32.8	32.3	.9	—	7.0	.9
1980	32.2	30.6	.8	—	6.7	.8
1981 ²	30.3	30.0	.8	—	6.6	.9
Year ending June 30						
1979	34.3	33.7	.8	—	7.1	1.0
1980	31.7	31.2	.9	—	5.0	.8
1981	31.5	29.5	.8	—	5.5	.8
1982 ³	29.8	29.6	.7	—	4.5	.8

¹Total removals (or sales) from U.S. factories plus those from Puerto Rico, and imports, minus exports. ²Subject to revision. ³Estimated.

Compiled from reports of the Bureau of Alcohol, Tobacco, and Firearms, Bureau of the Census, and AMS, USDA.

Eight States have already announced cigarette tax rate increases in 1982, exceeding the six that hiked taxes last year. Rates increased in Oregon, Utah, Michigan, Nebraska, Washington, Rhode Island, Missouri, and Wisconsin. Wisconsin's tax has risen to 25 cents a pack, the highest in the United States. Furthermore, a number of other States have proposed tax increases. With the depressed economy, spending commitments are exceeding budget revenues in many States, so legislators are seeking additional revenues.

Cigar Volume Declines

During July 1981-March 1982, U.S. cigar consumption totaled 2.7 billion *large cigars* (including cigarillos), 4 percent fewer than the year before. Demand has been declining in the low- and medium-priced categories for several years. In contrast, demand for higher priced cigars remains strong (table 3).

Production of *small cigars* (those weighing less than 3 pounds per thousand) totaled 1.03 billion in the first three quarters. For the year ending in June, output is estimated to have declined about 8 percent from a year ago (table 4).

Smoking and Chewing Tobacco

Smoking tobacco production and consumption for the year ending June 30 are showing a continuation of the downward trend that has prevailed since 1970. In the first 9 months of 1981/82, domestic smoking tobacco output declined about 7 percent from a year earlier. Imports also declined, and domestic sales dropped 2 percent from a year earlier.

Smokeless tobacco output in 1981/82 is expected to drop from the previous year. Plug and twist chewing tobacco

Table 4—Tobacco products: Output, 1980-82

Item	Year ending June 30—		
	1980	1981	1982 ¹
<i>Million pounds</i>			
Chewing tobacco			
Plug	16.2	18.4	16.2
Twist	1.9	1.8	1.8
Fine-cut	14.2	14.7	15.2
Loose leaf	74.5	69.6	73.0
Total	106.8	104.5	106.2
Snuff	24.4	24.4	26.5
Smoking tobacco in bulk (exports)	23.8	12.5	12.0
<i>Millions</i>			
Small cigars	1,502	1,452	1,340

¹Estimated.

Basic data compiled from reports of the Bureau of Alcohol, Tobacco, and Firearms, and Agricultural Marketing Service, USDA.

are both down, while loose leaf chewing tobacco and snuff are up.

Revised Product Classifications

Product classifications for collecting data on the manufacture and sale of snuff, smoking, and chewing tobacco have been revised by USDA's Agricultural Marketing Service in consultation with trade associations and manufacturers. The new classifications were used for collecting data for the first quarter of 1982. However, since data for previous periods have not been revised, the new classifications were not used in this report. For

the affected categories, reported estimates covering July 1981-June 1982 were made using July-December data under the old classifications. Data for 1981 will be revised within the next 2 months, and the new product classifications will be used in future reports.

The new product classifications are:

- Dry snuff—brands in which the tobacco is processed into dry, powdered flour.
- Moist snuff—moist brands in which the tobacco is processed into fine particles or strips.
- Loose leaf chewing—brands in which the tobacco is cut into small strips; formerly called "scrap."
- Firm plug—plug brands of the "conventional" type with a moisture content of less than 15 percent.
- Moist plug—so-called "plug in a pouch" or "soft" brands in which the moisture content is 15 percent or greater.

There are no changes in smoking or twist and roll chewing tobacco.

U.S. EXPORTS AND IMPORTS

Exports Slowing After Strong First-Half Rise

For the year ending June 1982, exports of unmanufactured tobacco are expected to be above 1980/81's 553 million pounds, export weight, (664 million, farm sales weight). During the 10 months from July 1981-April 1982, shipments increased 6 percent to 493 million pounds, while the average unit value of exports increased 10 percent. However, January-April exports were down 3 percent from the same period in 1981. The seasonal peak in shipments to Japan, the EC, and other European markets came in late 1981 (table 5).

Flue-cured tobacco exports (declared weight) during July-April were up 2 percent, and burley exports climbed 49 percent, reflecting 1981's near-record burley crop. Maryland exports also rose, while fire-cured exports were down. Shipments of cigar types dropped sharply. EC countries took less, with much of the reduction in the United Kingdom, where tax increases have depressed cigarette sales and Zimbabwe tobacco has been substituted for the U.S. product. Japan took more, largely because of the higher quality of U.S. offerings.

Exports for the second half of 1982 are not likely to reach 1981's 315 million pounds, despite lower projected 1982 global production and worldwide shortages of some types of tobacco. U.S. price support rates are higher, and consumption is stabilizing in major developed countries—traditional markets for U.S. leaf. Also, general economic activity remains depressed, and interest rates continue high. The value of the U.S. dollar remains strong relative to a number of currencies of developed countries, further adding to foreign buyers' costs. West Germany has scheduled a 40-percent increase in tobacco taxes effective July 1.

World Flue-Cured Production Lower¹

The world flue-cured crop is forecast at 6.2 billion pounds (2,824 million metric tons), down slightly from 1981, primarily because of reduced U.S. prospects. Production in *China* is expected to remain near the 1981 record, and output in *India* is estimated nearly 30 percent above last year.

Zimbabwe's tobacco auctions for 1981/82 began on March 16. Prices averaged US\$1.04 a pound through late May. A production goal of 212 million pounds was set, but this amount will not be realized because of lower-than-expected acreage and bad weather. The quality of the crop was lower than last year.

Malawi, another important African producer, is expected to turn out about 42 million pounds of flue-cured tobacco this year, slightly less than last year. Auctions began on April 15, and by May 20, prices averaged US\$1.02 a pound.

Canadian tobacco manufacturers are again negotiating a two-price system for the upcoming Ontario flue-cured crop. A guaranteed minimum of between Can\$1.55 and Can\$1.57 a pound is expected for the 237-million-pound production target.

Brazil's flue-cured tobacco production is expected to be about 6 percent higher than last year. Prices are also projected to be higher.

Imports for Consumption Decline

During July 1981-April 1982, U.S. imports for consumption of unmanufactured tobacco and customs category 170.8045 (tobacco manufactured or not manufactured, not specially provided for, other) were 7 percent below a year earlier (table 6). Cigarette leaf declined, while customs category 170.8045 tobacco increased. The latter category of tobacco was specified following a custom's classification change in 1980.

Arrivals of tobacco (general imports) for the first three quarters totaled 17 percent more than a year earlier. U.S. purchases of cigarette tobacco gained to supplement U.S. supplies. Therefore, by April 1, stocks of foreign-grown cigarette and smoking tobacco in the United States were 120 million pounds higher than a year earlier.

Caribbean Basin Initiative

President Reagan has asked Congress for authority to grant duty-free treatment for a number of articles imported from specified Caribbean Basin countries. Presumably, tobacco would be included as one of the agricultural commodities that could enter the U.S. duty-free under the proposal. Other concessions to Caribbean Basin countries, such as tax benefits and economic assistance, are included in the proposal.

Caribbean Basin countries produced about 150 million pounds of tobacco last year—about a third of total production was flue-cured and burley. Much of the output is exported. The U.S. imports about 30 million pounds a year from Caribbean Basin countries. The total includes 12 to 15 million pounds of burley, but little flue-cured.

¹Summarized from Foreign Agriculture Circular FT6-82, June 1982, and U.S. attaché reports.

**Table 5—United States exports of unmanufactured tobacco by types
and to principal importing countries, 1977-82**
(Declared weight)

Type and country	1977	1978	1979	1980	1981	January-April 1981	1982 ¹	1982 as a percentage of 1981
Million pounds								
Flue-cured	411.7	454.8	370.6	391.1	386.2	110.2	91.8	83
Burley	79.1	91.0	82.1	90.8	74.2	29.8	51.5	173
Maryland	7.7	10.6	6.0	7.1	7.3	1.2	.7	58
Fire-cured, Ky. and Tenn.	19.1	22.6	13.7	14.6	16.3	5.3	4.1	77
Virginia fire and sun-cured	3.6	2.5	3.1	2.9	1.5	.2	1.1	55
Green River and One Sucker	.1	.7	.2	.1	.2	*	*	183
Black Fat	2.7	2.6	3.2	2.6	2.5	1.0	1.2	120
Cigar wrapper	4.1	3.7	5.3	4.2	2.5	.9	.4	44
Cigar binder	.2	*	.1	.2	.1	*	*	—
Cigar filler	.3	.2	.2	.2	.5	.3	*	—
Perique	.1	*	.1	.1	.1	*	*	—
Stems, trimmings and scrap	99.9	98.9	77.2	77.5	83.8	31.9	24.0	75
Other unmanufactured, NEC ²	—	12.4	5.7	7.2	9.3	1.9	2.8	145
Total	628.6	700.0	567.4	598.7	584.5	182.7	177.7	97
Country of destination:								
United Kingdom	46.8	148.8	68.2	32.5	39.4	12.2	6.1	50
France	6.3	9.8	11.5	4.5	6.1	3.1	2.3	74
Belgium-Luxembourg	10.4	16.9	5.4	7.9	9.5	2.6	2.1	81
Netherlands	30.5	34.2	29.3	44.9	28.6	10.4	7.1	68
West Germany	78.9	53.2	67.7	100.7	83.2	17.5	16.3	93
Denmark	16.9	27.1	16.4	17.5	11.1	4.6	6.8	148
Ireland	5.4	5.3	6.9	3.6	3.9	1.5	1.9	127
Italy	40.6	41.0	34.8	30.7	26.5	16.0	20.0	125
Total EC	235.8	336.3	240.2	242.2	208.4	68.0	62.8	92
Switzerland	28.8	26.2	19.3	20.1	22.2	4.4	5.2	118
Finland	5.3	7.8	7.0	9.5	11.0	4.4	2.3	52
Norway	6.0	4.2	5.7	6.8	4.2	.7	1.0	143
Sweden	11.8	17.5	13.7	15.4	9.9	3.6	1.6	44
Spain	5.1	19.9	1.0	28.7	33.4	9.7	10.9	112
Thailand	16.0	18.2	18.8	22.6	18.4	13.4	27.4	204
Republic of Korea	9.8	9.9	13.1	13.6	10.7	*	1.1	0
Malaysia	12.3	10.1	8.4	8.4	6.9	1.5	3.0	200
Philippines	15.4	13.9	11.4	11.5	11.2	4.0	4.0	100
Taiwan	20.6	25.8	41.4	14.1	22.3	2.8	0	—
Japan	135.4	102.3	95.9	82.1	117.0	26.7	24.1	90
Australia	14.2	12.4	12.4	13.4	12.6	4.1	3.1	76
New Zealand	5.0	3.7	4.0	3.7	3.4	1.0	1.7	170
Egypt	26.7	24.5	3.8	17.4	16.1	10.3	*	—
Canada	4.7	4.2	4.5	16.9	16.3	.7	1.8	257
Canary Islands	7.6	10.3	4.4	13.0	12.6	5.0	4.7	94
Other countries	68.1	52.8	62.4	59.3	47.9	22.4	23.0	103
Total	628.6	700.0	567.4	598.7	584.5	182.7	177.7	97

¹Preliminary. ²New classification, January 1, 1978. Previously included in manufactured in bulk. * Less than 100,000 pounds.

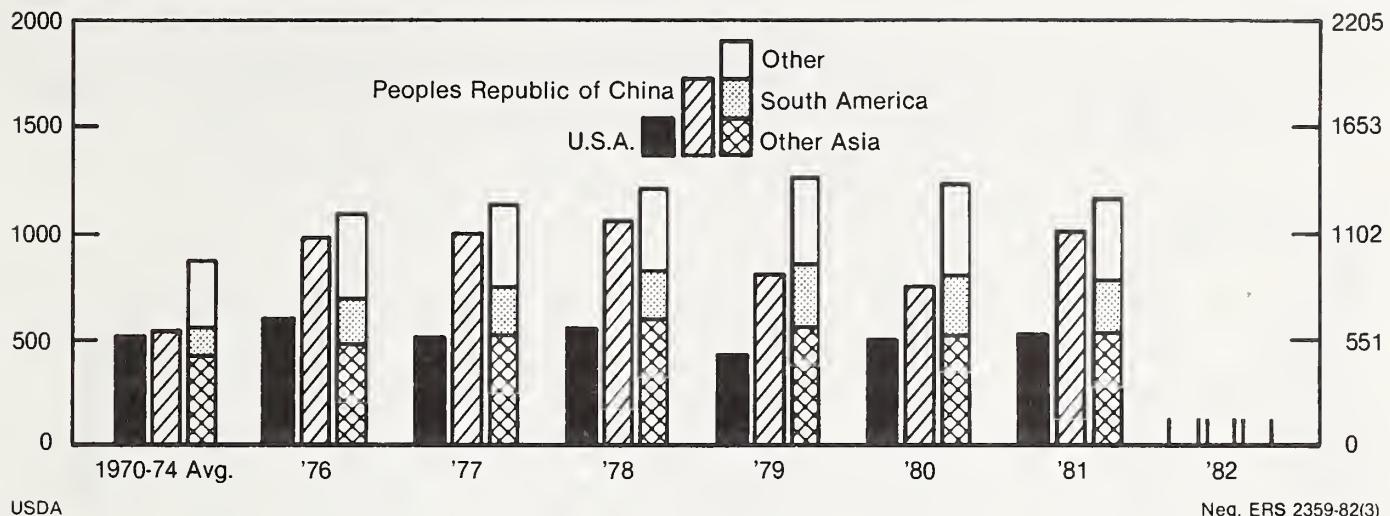
Detail may not add to total due to rounding.

Compiled from publications and records of the Bureau of the Census.

Flue-Cured Tobacco: Estimated World Production

Thous. metric tons

Mil. lbs.



USDA

Neg. ERS 2359-82(3)

TOBACCO LEAF SITUATION AND OUTLOOK²

1982 Crop Prospects

Cool weather during April, particularly in the Carolinas, slowed early-season growth of the tobacco, while cool nights in early May continued the slow plant growth. Between mid-May and early June, the weather was better. The setting of the flue-cured crop was essentially complete in South Carolina and Georgia by mid-May, and by early June, it was virtually complete in North Carolina and Virginia but still in full swing in Kentucky and Tennessee. In early June, soil moisture was adequate to excessive in most areas.

Auctions for the 1982 flue-cured crop are expected to begin in mid-July, depending on recommendations of the Flue-Cured Tobacco Advisory Committee (scheduled to meet June 29) and when a sufficient marketable volume becomes available. Last year's auctions began July 14.

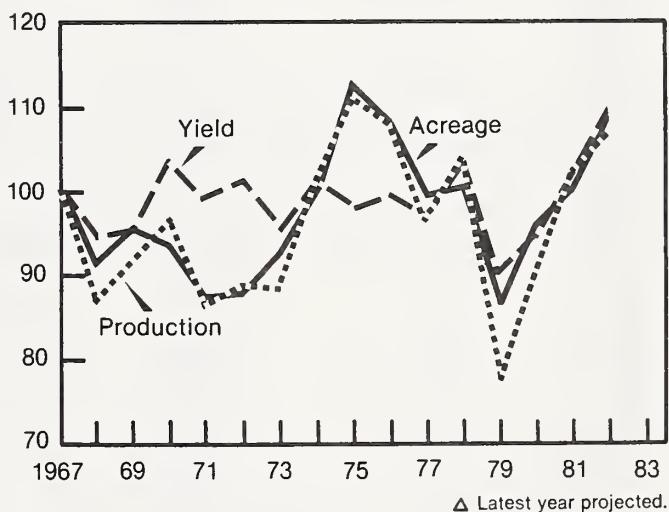
The 1981 amendment to the Tobacco Inspection Act of 1935 requires growers to pay for the USDA grading service. Since October 1, 1981, the cost has been about 0.45 cent a pound. The fee is expected to be increased this marketing season.

Despite a larger carryover, the smaller sized crop will likely reduce the total supply. This, along with a 10.8 percent higher support rate, is expected to push average prices above last year (table 7).

USDA's Crop Reporting Board will publish estimates of flue-cured acreage, yields, and production by State for all types combined on July 12. The August 11 crop report will contain separate estimates of acreage, yield, and production for each class and type by State. Subsequent monthly reports, September 10 through November 10, will contain estimates of acreage, yield, and production by State for all classes and types combined. However, some State Statistical Reporting Service offices plan to report estimates by type of tobacco for States producing

Tobacco Acreage, Yield and Production

% of 1967



USDA

△ Latest year projected.

Neg. ERS 8149-82(3)

a significant amount of more than one type. The Crop Reporting Board will publish estimates of burley acreage, yield, and production by States on December 10.

Pesticide Residue Developments

To receive price supports, tobacco producers must certify that they did not use DDT, TDE, toxaphene, or endrin insecticides. Growers certifying falsely are subject to fines or imprisonment.

DDT and TDE residue samplings of the 1981 crop showed one sample with a residue of three parts per million (ppm) or more. If an analysis showed DDT-TDE residues of three ppm or greater, the grower was denied price support.

Last year, USDA's maleic hydrazide (MH) testing program monitored growers' efforts to keep MH within limits acceptable to major foreign importers. About 7,000 samples from auction warehouses averaged 108 ppm—20 percent below residue levels found in the 1980 crop. However, residues are still considerably above the level

²All quantities in this section are stated in farm sales weight unless otherwise noted.

Table 6 --U.S. imports of unmanufactured tobacco for consumption and general, principal categories,
and countries of origin, 1981, and January-April 1981-82 1/

(Declared weight)

Classification and country of origin	Imports for consumption				General imports (arrivals)			
	January-April		1982 as a percentage of 1981	1981	January-April		1982 as a percentage of 1981	1981
	1981	1982	of 1981	1981	1981	1982	of 1981	1981
	--- Million pounds ---				--- Million pounds ---			
<u>Cigarette tobacco:</u>								
Leaf:								
Oriental								
Turkey	100.5	33.8	35.2	104	127.0	39.3	84.1	214
Greece	25.3	9.1	9.0	99	26.8	13.3	22.1	166
Yugoslavia	12.6	4.8	3.9	81	7.3	7.0	4.6	66
Bulgaria	12.7	3.8	3.2	84	18.1	10.4	10.6	102
Other countries	27.4	11.0	7.1	65	17.6	10.1	3.3	33
Flue-cured	15.0	9.4	2.2	23	10.9	3.4	4.7	138
Burley	32.4	27.7	1.1	39	46.4	16.1	4.4	27
Other	3.5	1.0	.7	70	2.2	.1	.5	500
Subtotal	229.4	100.6	62.4	62	256.3	99.7	134.3	134
Manufactured or not manufactured, not: specially provided for, other								
Brazil	34.0	7.3	7.1	97	41.3	5.7	3.4	60
Korea, Republic of	23.3	7.4	4.8	65	27.8	13.2	4.9	37
Mexico	4.5	1.1	1.3	118	4.5	2.0	.4	20
Other	39.7	8.2	9.7	118	63.3	15.2	15.0	99
Subtotal	101.5	24.0	22.9	95	136.9	36.1	23.7	66
<u>Scrap: 2/</u>								
Brazil	2.7	.5	.7	140	2.4	.0	.3	0
Korea, Republic of	*	0	.1	0	*	0	.0	0
Italy	*	0	.1	0	*	0	.5	0
Mexico	*	.3	.2	67	*	.2	0	0
Turkey	6.7	2.4	2.9	121	3.6	3.3	5.7	173
Other countries	8.2	2.5	2.7	108	7.2	3.0	1.1	37
Subtotal	17.6	5.7	6.7	118	13.2	6.5	7.6	117
TOTAL	348.5	130.3	92.0	71	406.4	142.3	165.6	116
<u>Cigar tobacco:</u>								
Wrapper	.9	.6	.5	83	.9	.7	.7	100
Filler-stemmed and unstemmed								
Dominican Republic	1.4	.7	.5	71	5.3	3.1	4.1	132
Other countries	5.0	2.6	.5	19	16.0	6.6	3.8	58
Subtotal	6.4	3.3	1.0	30	21.3	9.7	7.9	81
<u>Scrap:</u>								
Philippine Republic	8.5	3.1	2.7	87	8.5	2.4	2.2	92
Indonesia	7.2	2.9	1.8	62	8.1	2.7	1.5	56
Dominican Republic	6.6	2.6	1.8	69	4.8	2.2	.5	23
Brazil	3.4	.9	.7	78	5.2	2.1	.2	10
Other countries	16.0	5.2	5.3	101	15.0	3.6	6.4	178
Subtotal	41.7	14.7	12.3	84	41.6	13.0	10.8	83
TOTAL	49.0	18.6	13.8	74	63.8	23.4	19.4	83
<u>Stems</u>								
GRAND TOTAL	38.2	9.3	8.2	88	45.2	10.8	10.4	96

1/ Preliminary.

2/ Includes minor quantities for smoking tobacco, chewing tobacco, and snuff. Detail may not add to total due to rounding.

Compiled from publications and records of the Bureau of the Census.

Table 7 -- Flue-cured tobacco, types 11-14, and burley tobacco, type 31: Acreage, yield, production, carryover, supply, disappearance, season average price, and price support operations, 1972-82

(Farm-sales weight)

Marketing Year	Acreage Harvested	Yield per acre	Marketings	Manufacturers and others	Beginning stocks ^{1/}	Total	Total Supply					
Thousand acres	Pounds	--- Million pounds ---										
Flue-cured, types 11-14												
Burley, type 31												
Disappearance	Total	Domestic	Exports	Average price per pound	Price support level	Placed under loan	Quantity : Percentage of crop					
--- Million pounds ---	--- Cents ---	--- Million pounds ---	Percent									
Flue-cured, types 11-14												
1971.....	1,142.5	622.5	480.0	77.2	69.4	55.7	5.2					
1972.....	1,183.0	664.2	518.8	85.3	72.7	24.3	2.4					
1973.....	1,301.0	703.0	598.0	88.1	76.6	30.7	2.7					
1974.....	1,200.6	652.3	548.3	105.0	83.3	23.0	1.9					
1975.....	1,193.1	670.6	522.5	99.8	93.2	259.0	18.4					
1976.....	1,148.2	634.0	514.2	110.4	106.0	277.3	21.0					
1977.....	1,147.3	608.2	539.1	117.6	113.8	195.6	17.3					
1978.....	1,182.8	584.1	598.7	135.0	121.0	64.1	5.3					
1979.....	1,083.2	563.2	520.0	140.0	129.3	72.0	7.4					
1980.....	1,038.9	548.9	490.0	144.5	141.5	137.2	12.6					
1981.....	5/ 1,110.0	5/ 560.0	5/ 550.0	166.4	158.7	106.4	9.3					
1982.....					175.9							
Burley, type 31												
1971.....	569.9	515.2	54.7	80.9	71.5	.2	---					
1972.....	609.6	534.5	75.1	79.2	74.9	22.9	3.9					
1973.....	619.0	533.1	86.8	92.9	78.9	.7	.1					
1974.....	586.7	518.8	67.9	113.7	85.8	2.8	.4					
1975.....	602.5	510.1	92.4	105.5	96.1	50.7	7.9					
1976.....	606.3	489.6	116.8	114.2	109.3	46.6	7.0					
1977.....	611.3	494.8	116.5	120.0	117.3	57.0	9.2					
1978.....	624.3	502.8	121.4	131.2	124.7	67.7	10.8					
1979.....	631.8	498.5	133.3	145.2	133.3	7.3	1.5					
1980.....	583.1	477.6	105.5	165.9	145.9	.0	.0					
1981.....	5/ 620.0	5/ 480.0	5/ 140.0	180.7	163.6	.8	.1					
1982.....					181.3							

^{1/} July 1 for flue-cured; October 1 for burley. ^{2/} Adjusted for change in conversion factor January 1, 1977.

^{3/} Stocks revision January 1, 1979 report. ^{4/} Excludes production held on farms.

^{5/} Estimated from acreage intentions, projected yield.

found in the test plots of extension land grant colleges (67 ppm) and the amount West German health officials and the cigarette industry consider acceptable (80 ppm). USDA is cooperating with extension personnel to continue the educational program on the proper use of MH. Cigarette manufacturers and exporters are providing funds for MH residue tests on the 1982 crop.

Rules for Marketing Burley Tobacco

The U.S. Department of Agriculture has obtained comments from the tobacco industry and others on ways to detect and deter the practice of "nesting," the packing of foreign matter or inferior tobacco with higher quality tobacco. USDA also received comments on alternative packaging methods under which burley tobacco would be eligible for inspection and price support.

Before 1977/78, price support was available only for burley tobacco tied in hands. Beginning with 1977/78, price support has been available for untied bales of burley. Several other methods of packaging can be used, such as placing looseleaf burley on burlap sheets, but those methods are not eligible for price supports. The comments received will be evaluated before USDA proposes any changes in the rules under the Tobacco Inspection Act and the Agricultural Act of 1949.

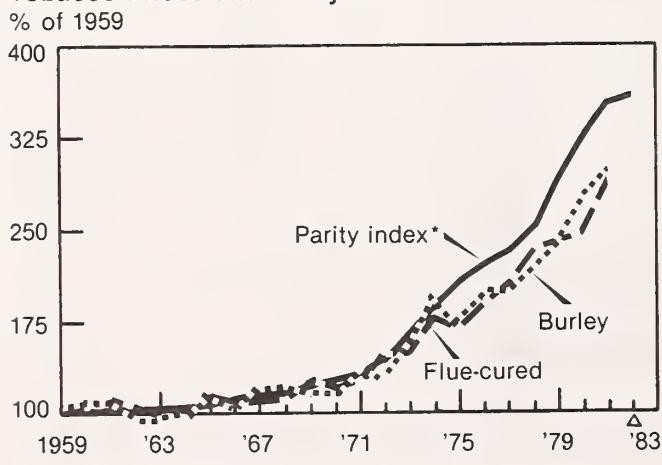
GAO Report on Tobacco Program

The General Accounting Office (GAO) has released a report entitled *Tobacco Program's Production Rights and Effects on Competition*. The GAO report concludes that USDA's tobacco program, through its acreage allotment, marketing quota, and price support provisions, is affecting the competitiveness of the U.S. tobacco industry in world and domestic markets and is having an impact on the income of those farmers who grow tobacco.

Tobacco Policy

Section 1109 of the Agriculture and Food Act of 1981 (P.L. 97-98), expressed the intent of Congress that the tobacco price support and production adjustment program be administered in such a manner as to result in no net cost to taxpayers, other than administrative expenses.

Tobacco Prices and Parity Index



*Prices paid for all items including interest, taxes, and wage rates.

△ 82 is June indication

USDA

Neg. ERS 782-82(6)

In keeping with this, USDA has taken two administrative actions. Under the first action, producer associations will be allowed to increase the amount deducted from price support advances made to growers. These deductions, which pay association overhead expenses, had remained at \$1.00 per cwt since 1974. The limit was removed to allow associations to set a larger deduction with Commodity Credit Corporation (CCC) approval. Larger deductions will reduce the amount that associations have to borrow to cover operating costs.

Under the second action, loan agreements between the CCC and the associations specify that the net gain from a crop must be distributed to producers unless another disposition is requested and approved by CCC. The new policy will allow the net gain from the sale of one crop to be used to offset losses incurred by an association from other crops.

While the two administrative changes may reduce the future losses of the tobacco program, legislation may also be needed. In February and March, the U.S. Senate Committee on Agriculture, Nutrition, and Forestry and the House Subcommittee on Tobacco and Peanuts held field hearings in several States to obtain views on possible changes in the tobacco program. These comments, together with additional ones, are being reviewed and evaluated, and bills to change the tobacco program will likely be introduced in Congress soon.

FLUE-CURED

Leaf Stocks Increase; Use Gains

On April 1, stocks of flue-cured tobacco (types 11-14) totaled 2.25 billion pounds, 23 million above a year earlier. Stocks held by manufacturers increased, while loan stocks fell by 66 million pounds.

Total disappearance during July 1981-March 1982 was 903 million pounds, about 82 million higher than a year earlier. Exports and domestic disappearance were both up. U.S. cigarette production was little different from the year before; use of imported cigarette tobacco declined.

Exports Increase

With the larger, better quality 1981 crop, U.S. flue-cured exports were running about 3 percent ahead of last season. For the 10 months through April, exports totaled 455 million pounds, compared with 443 million a year earlier.

Of the leading destinations for flue-cured tobacco, Japan took more during July-April, while West Germany and the United Kingdom purchased less. On the other hand, Japan has taken little so far this calendar year. Several EC countries imported less from the United States as more supplies became available from Zimbabwe and other lower cost sources.

Disappearance Rises

Disappearance of flue-cured tobacco in 1981/82 is expected to be about 6 percent above the 1.04 billion pounds used the previous year, but about 17 percent below the 1973/74 record. Use prospects are less than last season's marketings, so the carryover will increase (table 7).

From July 1981 to April 1982, 128 million pounds of loan stocks were sold. Unsold stocks on April 30 totaled 442 million pounds, compared with 472 million a year earlier. The record was 960 million in January 1965 (table 8).

1982 Flue-Cured Acreage To Drop

The 1982 effective poundage allotment is 979 million pounds, down 12 percent from last year. Some growers are again cooperating with the Agricultural Stabilization and Conservation Service (ASCS) in leaving the bottom four leaves in the field (the "four-leaf program"), but harvested acreage will again fall considerably short of allotted acreage (table 9).

Growers' February 1 planting intentions were to set 8 percent less flue-cured acreage than in 1981. Last year, growers leased 45 percent of the poundage quota from allotment owners within their county. The proportion is expected to increase again this year. Starting in 1972, flue-cured marketing quotas could be leased and transferred throughout the season, subject to limitations enacted in 1977.

Assuming a normal growing season and considering the intended acreage, the crop may total about 990 million pounds. The combined production and carryover would make the 1982/83 supply about 4 percent lower than this year's 3.16 billion pounds.

1982 Price Support Details

Flue-cured is under acreage-poundage marketing quotas, and price support is not provided if growers exceed their farm allotments. For 1982, a 10-percent acreage

tolerance is included to accommodate growers who leave the four lower leaves unharvested. By the April 15 deadline, farms accounting for 17 percent of the flue-cured quota had signed up to participate in the four-leaf program—slightly higher than last year's signup.

The 1982 loan rates for the various grades of flue-cured tobacco are expected to range from \$1.17 to \$2.27 a pound, reflecting the support level of \$1.759 a pound.

**Table 8—Tobacco loan stocks, 1980-82
(Farm-sales weight)**

Type	End of May		
	1980	1981	1982 ²
Million pounds			
Flue-cured, 11-14	582.3	628.3	551.3
Burley, 31	109.4	32.7	.8
Virginia, 21	2.7	2.3	2.6
Kentucky-Tennessee, 22-23	22.2	17.7	14.0
Kentucky-Tennessee, 35-36	5.9	7.1	8.6
Ohio, 42-44	.9	.5	.2
Puerto Rican, 46	6.3	8.3	11.0
Connecticut Valley, 51-52	1.5	1.4	2.2
Wisconsin, 54	(1)	(1)	.4
Wisconsin, 55	0	.3	1.2
Total	731.2	698.6	592.3
Uncommitted			
Flue-cured, 11-14	517.4	471.7	3441.9
Burley, 31	38.4	0	.6

¹Negligible. ²April 30. ³June 1.

Compiled from records of Tobacco and Peanuts Division, ASCS.

Table 9—Flue-cured and burley tobacco: Marketing quota and marketings, 1972-82

Year	Quota			Marketings			
	Basic	Effective	Actual	Over-quota	Under-quota	Effective underquota ¹	Net carryover ²
Million pounds							
Flue-cured, types 11-14							
1972	1,071.2	1,056.7	1,022.1	41.2	72.9	68.1	26.8
1973	1,178.7	1,205.6	1,159.0	54.8	100.5	95.3	40.5
1974	1,296.6	1,337.1	1,245.3	50.0	138.9	132.4	82.5
1975	1,491.4	1,572.3	1,414.6	50.9	203.2	192.3	141.0
1976	1,268.1	1,409.1	1,316.0	49.4	139.9	130.2	80.8
1977	1,116.5	1,197.3	1,124.2	42.6	115.2	106.9	64.3
1978	1,117.2	1,181.5	1,205.9	65.6	43.9	41.8	-26.4
1979	1,094.9	1,068.5	973.8	24.8	118.8	117.0	92.2
1980	1,094.4	1,186.5	1,086.1	36.0	137.9	135.1	99.1
1981	1,012.9	1,111.4	1,144.3	64.9	31.3	29.2	-35.6
1982 ⁴	1,012.7	978.4					
Burley, type 31							
1972	531.5	611.5	588.6	30.7	45.7	44.6	13.9
1973	559.7	573.6	460.7	11.3	113.1	111.7	100.3
1974	606.5	706.8	610.4	23.0	118.9	104.0	81.0
1975	669.5	750.4	639.9	21.8	127.5	113.4	91.6
1976	634.8	726.4	663.6	33.1	96.2	82.3	49.2
1977	636.2	683.4	612.6	27.2	99.0	80.8	53.6
1978	614.2	667.8	614.2	31.5	88.2	67.6	36.1
1979	614.2	647.8	472.2	12.2	188.6	168.8	155.2
1980	614.4	768.9	557.5	11.6	224.3	200.1	181.8
1981 ³	660.1	841.9	725.6	25.2	143.0	129.4	104.2
1982 ⁴	679.4	783.8					

¹Underquota marketings less ineligible carryover. ²Effective underquota marketings less overquota marketings. ³Subject to revision. ⁴Preliminary.

Compiled from records and reports of Price Support and Loan Division, ASCS.

Table 10—Flue-cured tobacco: Effective farm quotas, designations, and marketing, 1980-82¹

Type and State or marketing area	Effective from quotas		Initial designation ²		Final designation		Marketings	
	1982	Change from 1981	1981	1982	1980	1981	1980	1981 ³
11-Virginia (E)	85	-21.3	131	102	128	134	84	114
11-North Carolina (D,E)	233	-19.7	220	219	218	225	245	299
Total - 11	318	-20.1	351	321	345	359	330	413
12-North Carolina (C)	323	-2.4	433	372	515	438	401	344
13-North Carolina (B)	86	-8.4	109	99	123	113	98	97
13-South Carolina (B)	124	-15.1	150	126	151	150	125	148
Total - 13	210	-12.4	259	225	274	263	224	245
14-Alabama	1	0	—	—	—	—	1	1
14-Florida (A)	22	-8.7	24	22	23	25	20	23
14-Georgia (A)	104	-12.0	129	112	136	131	110	119
Total - 14	127	-11.3	153	133	159	156	131	143
Grand total, flue-cured⁴	978	-12.4	1,195	1,052	1,293	1,216	1,085	1,144

¹Data may not add to totals due to rounding. ²Growers were allowed to designate 110 percent of their effective quotas. ³Excludes 25 million pounds carried over on farms. ⁴Computed from unrounded data.

Compiled from reports from Tobacco Division, Agricultural Marketing Service, and Price Support and Loan Division, Agricultural Stabilization and Conservation Service.

Again, no support applies to P5L, P5F, P5G, NIL, NIGL, NIXO, NIXL, and NIPO. The share of the crop accounting for these grades ranged from 4 to 11 percent during 1974-80. As in the past, no support will be offered on tobacco graded N2, No-G, U, W, or scrap.

Growers Again Designate Warehouse Preferences

By the April 15 deadline, growers of flue-cured tobacco had designated 98 percent of their marketable quota to the auction warehouses where they want to sell their 1982 crop. Since this procedure began in 1974, sales schedules and inspection services are provided at individual warehouses on the basis of the quantity of tobacco designated (table 10).

After growers make warehouse designations at their local ASCS office, grower lists are prepared for each warehouse, and the information is sent to the Flue-Cured Tobacco Advisory Committee. In addition to recommending opening dates and sales schedules, the committee advises USDA on the geographic grouping of auction markets and the distribution of graders.

BURLEY

Burley Use Rises, But Stocks Will Still Gain

Total burley use rose during the first half of the season, October 1981-March 1982. Increased exports more than offset decreased domestic use. The 6-month disappearance of 300 million pounds was 5 percent above a year earlier. Domestic use dropped to 236 million pounds. Use of imported tobacco declined, but it is much higher than 5 years ago. For the season, exports are expected to rise, while domestic use stays about the same, pushing disappearance 6 percent above 1980/81.

With last year's large crop, burley exports during October 1981-April 1982 were 66 percent above a year earlier. For the first 7 months of the marketing year, burley shipments totaled 86 million pounds, compared

with 52 million a year earlier. Most major destinations—Japan, Thailand, France, Switzerland, and West Germany—took more. On an unstemmed leaf basis, the export unit value averaged \$2.56 a pound during October-April, up 24 cents from October.

The carryover at the beginning of the 1981 season, at 1 billion pounds, was down from the year earlier. By April 1, with the 1981 crop in storage, stocks totaled 1.43 billion pounds, 129 million above a year earlier. Like a year earlier, there were negligible unsold burley loan holdings. Even with larger exports and higher total use, the carryover may be about 10 percent above last year (table 7).

Little Change Seen for the 1982 Crop

For 1982, the effective burley poundage quota is 789 million pounds, about 6 percent less than in 1981. According to February 1 planting intentions, farmers said they planned to set about 1 percent less burley acreage than last year. However, the survey was conducted before the quota announcement. Nevertheless, most farmers were generally aware of the expected changes. Assuming yields near the 1972-81 average—excluding 1979's low—production would total around 730 million pounds, about the same as last season. The indicated carryover plus the projected crop would push the 1982/83 supply about 110 million pounds above this year's 1.73 billion.

SOUTHERN MARYLAND

Larger Crop; Lower Prices

The 1981 crop of Maryland tobacco (type 32)—about 70 percent larger than 1980—sold for an average of \$1.55 a pound, 14 cents below a year earlier. However, prices at auction sales in Maryland averaged \$1.74 a pound—5 cents higher than the year before. The crop grown in Maryland was medium bodied and of slightly higher quality than a year earlier. Auction sales in Maryland

Table 11—Flue-cured and burley prices: Actual and support level compared with parity prices, 1971-82

Year	Flue-cured tobacco, types 11-14				Burley tobacco, type 31			
	Parity price ¹	Support level	Season average	Percent of parity ²	Parity price ¹	Support level	Season average	Percent of parity ²
<i>Cents per pound</i>		<i>Percent</i>		<i>Cents per pound</i>		<i>Percent</i>		
1971	101.0	69.4	77.2	68.7	76.4	104.5	71.5	80.9
1972	106.0	72.7	85.3	68.6	80.5	111.0	74.9	79.2
1973	123.0	76.6	88.1	62.3	71.6	129.0	78.9	92.9
1974	136.0	83.3	105.0	61.2	77.2	147.0	85.8	113.7
1975	150.0	93.2	99.8	62.1	66.5	158.0	96.1	105.5
1976	155.0	106.0	110.4	68.4	71.2	160.0	109.3	114.2
1977	162.0	113.8	117.6	70.2	72.6	166.0	117.3	120.0
1978	176.0	121.0	135.0	68.8	76.7	184.0	124.7	131.2
1979	203.0	129.3	140.0	63.7	69.0	208.0	133.3	145.2
1980	222.0	141.5	144.5	63.7	65.1	234.0	145.9	165.9
1981	243.0	158.7	³ 166.4	65.3	68.0	254.0	163.6	180.7
1982	252.0	175.9		69.8		³ 264.0	181.3	

¹Beginning of marketing year; July 1 for flue-cured and October 1 for burley. ²Calculated by National Economics Division, ERS. ³Through May 1.

Compiled from Agricultural Prices, monthly issues.

**Table 12—Southern Maryland tobacco, type 32: Acreage, yield, production, carryover, supply, disappearance, season average price, 1973-82
(Farm sales weight)**

Marketing year ¹	Acreage harvested	Yield per acre	Supply			Disappearance			Average price per pound to growers
			Production	Stocks following Jan. 1	Total	Total	Domestic	Exports	
<i>Thousand acres</i>			<i>Pounds</i>			<i>Million pounds</i>			<i>Cents</i>
1973 ²	27.8	1,260	35.0	43.8	78.8	26.1	13.8	12.3	87.8
1974 ²	26.0	1,260	32.8	51.7	84.5	33.5	25.0	8.5	92.2
1975 ²	23.0	955	22.0	53.6	75.6	35.7	26.0	9.7	107.5
1976 ²	25.0	1,205	30.1	41.9	72.0	29.9	17.4	12.5	110.0
1977 ²	25.0	1,230	30.8	45.3	76.1	29.0	19.6	9.4	115.1
1978 ²	24.0	1,275	30.6	41.9	72.5	31.1	21.1	10.1	123.1
1979 ²	19.5	1,130	22.0	41.3	63.4	33.6	23.6	10.0	139.7
1980 ²	24.0	1,091	26.2	32.6	58.8	27.3	18.6	8.7	169.0
1981	34.2	1,294	44.3	37.0	81.3	³ 25.0	³ 15.0	³ 10.0	155.4
1982 ⁴	24.0	1,200	28.8	56.3	85.1				

¹Year beginning October 1. ²Includes sales and certification. ³Estimated. ⁴Estimated carryover; projected crop.

began March 16 and ended May 6. In a referendum in February, Maryland growers rejected USDA grading with the required fee, so that service was not provided this year.

About a third of 1981 production was in North Carolina, South Carolina, and Virginia—all States producing flue-cured tobacco. Prices averaged only \$1.16 a pound in these States, because the quality was lower than in Maryland.

Growers of Maryland-type tobacco have not approved marketing quotas since the 1965 crop, so it is not eligible for price support. The 1981 farm legislation provides prohibitive penalties for growing and marketing Maryland tobacco in any quota area. So, unlike 1981, little Maryland tobacco is expected to be produced outside its traditional area in 1982.

Falling Use Points To Increasing Stocks

Maryland tobacco goes almost entirely into cigarettes. The disappearance during the first half of the year was

10.5 million pounds, about 0.5 million below a year earlier. Exports were up, while domestic disappearance declined. For 1981/82, disappearance of Maryland tobacco is forecast to fall below last season's 27.3 million pounds. With increased supplies, the January 1 carryover will rise (table 12).

Based on farmers' February planting intentions and average yields, the 1982 crop will be down sharply because essentially all production will return to traditional areas. However, even if the prospective crop is achieved, the supply for 1982/83 would still be greater than last year because of the large beginning stocks.

FIRE-CURED

1981/82 Supplies Down

The 1981 crop was about the same size as the year before, and quality improved. The carryover was a little lower. So, with higher quality and reduced supplies, the

crop averaged \$1.68 a pound, 30 cents more than a year earlier. Country purchases (two-thirds of the crop) averaged \$1.75 a pound, while auction sales averaged \$1.54. Growers placed 3 percent of the 1981 crop under loan, a smaller share than in 1980. Much that went under loan consisted of lugs and nondescript grades for which demand is limited.

The disappearance of fire-cured tobacco (types 21-23) during the first half of 1981/82 was 12.3 million pounds, nearly 10 million below last season. Exports were up about a fifth, while domestic use was off sharply. The production of plug chewing tobacco, smoking tobacco, and some other products using fire-cured tobacco fell.

Because of last season's higher prices, growers may expand acreage by 3 percent. According to February 1 planting intentions, increases are expected in both the Kentucky-Tennessee and Virginia areas. On the basis of the indicated acreage, with an average yield, growers could produce 40.4 million pounds, about 8 percent more than in 1981. With prospects for a larger carryover, the supply for 1982/83 will likely rise.

DARK AIR-CURED

Disappearance Rises

Disappearance of dark air-cured and sun-cured tobacco (types 35-37) during the first half of 1981/82 was 7.1 million pounds, up 1.6 million from a year earlier. Domestic use was up, despite the fact that the manufacture of plug chewing tobacco—a major domestic outlet for dark air-cured tobacco—was below a year earlier. Exports were down a little. Black Fat tobacco exports—a semiprocessed product consisting of dark air-cured and fire-cured leaf—totaled 564,000 pounds during October 1981-April 1982, a decline of 84,000 from a year earlier. Almost all Black Fat goes to West African destinations.

Growers received 6-1/2 cents a pound more for about the same size crop as in 1980. Growers placed 9 percent of production under loan, about the same as a year earlier. For 1981/82, disappearance is expected to increase, but the carryover will stay about the same.

This year, growers of dark air-cured and sun-cured tobacco plan to harvest around 9,650 acres of tobacco, about 7 percent less than last year. With average yields, the crop could reach 16 million pounds, slightly less than last season. Therefore, with the 1981/82 carryover about unchanged from a year earlier, the 1982/83 supply will be around this season's level.

CIGAR TOBACCO

Production To Decline

Supplies of domestically grown cigar tobacco are up a little this year because of increased 1981 production. Also, carryover stocks were higher. If yields are average, production in 1982/83 will be off about a fifth; indicated acreage is about 15 percent lower (table 15).

With average yields and intentions for about the same acreage as this year, filler production (U.S. and Puerto Rico) could decline from last season's 31 million pounds.

Binder output may decline by 4.5 to 5 million pounds. Allotments for Connecticut Valley binder (types 51-52) apply again this year. USDA transferred filler and binder allotments (types 42-44 and 54-55) to growers who wanted to increase their 1982 plantings. Under terms of the annual reallocation, USDA transferred the allotments from growers who did not wish to use them this year. But the 614 acres in Wisconsin and the 1,175 in Ohio that were transferred represented less than half of the 1981 reallocation.

Binder acreage intentions are down 24 percent in southern Wisconsin and 9 percent in northern Wisconsin. With average yields, the acreage cutback would reduce production to 22 million pounds—still above average disappearance for recent years. Wisconsin binder goes into chewing tobacco.

Wrapper production is expected to decline. Intended plantings are down 55 percent for Connecticut Valley wrapper because of a shift to homogenized leaf, which requires considerably less natural wrapper.

April 1 holdings of U.S. and Puerto Rican cigar tobacco (types 41-62) totaled 149 million pounds, essentially the same as a year earlier. Binder and wrapper types rose, while filler declined. On April 1, U.S. stocks of foreign-grown cigar tobacco were 93 million pounds, about 2 percent above the previous year. During the first half of 1981/82, manufacturers used about 6 million pounds less imported cigar tobacco than a year earlier.

Filler Use Up

Disappearance of cigar filler during the first half of the year was 22 million pounds, 4 million above last year. Supplies were larger and prices were weaker than last season.

For 1981/82, filler tobacco disappearance may rise slightly from last year, to about the 1978/79 level. The carryover will likely rise to about 64 million pounds.

Cigar Binder Use Steady

Cigar binder disappearance during October-March was 16 million pounds, 3 million above a year earlier. Yet, Wisconsin binder (types 54-55) disappearance for 1981/82 may not change much from last year. As an indication of limited demand, prices and farm purchases were lower, and loan takings were larger. Disappearance of Connecticut Valley binder tobacco for 1981/82 is estimated above last season. Carryover stocks are expected to decline a little.

Wrapper Use Declines

Shade-grown wrapper use is below last year, because some manufacturers are shifting to homogenized leaf. Production will drop sharply this year, lowering supplies to 8 million pounds, down from 10 million in 1981/82. The wrapper crop rose in value from \$9.80 a pound in 1981 to \$10.00 this year.

The disappearance of cigar wrapper during July-March was 5.5 million pounds, about .5 million lower than a year earlier. Domestic use increased, but exports fell.

Table 13—Fire cured tobacco, Kentucky-Tennessee types 22-23, and Virginia fire-cured type 21 Acreage, yield, production, carryover, supply, disappearance, season average price, and price support operations, 1973-82

(Farm-sales weight)

Marketing year beginning October 1	Acreage harvested	Yield per acre	Production	Beginning stocks			
				Manufacturers and other	Under loan	Total	Total supply
Kentucky-Tennessee fire-cured, types 22-23							
1973	16.6	1,668	27.7	54.2	3.1	57.3	85.0
1974	16.2	1,602	26.0	44.0	1.1	45.1	71.1
1975	18.4	1,772	32.6	40.5	.1	40.7	73.3
1976	21.2	1,567	33.2	42.6	(¹)	42.6	75.8
1977	25.6	1,767	45.2	41.2	(¹)	41.2	86.4
1978	27.1	1,898	51.4	50.0	1.0	51.0	102.4
1979	22.1	1,791	39.6	54.0	11.1	65.1	104.7
1980	19.4	1,685	32.6	48.9	19.1	68.0	100.6
1981	20.6	1,578	32.4	52.4	10.7	63.1	95.5
1982 ²	21.2	1,700	36.0			65.5	101.5
Virginia fire-cured, type 21							
1973	4.7	1,205	5.7	7.6	(¹)	7.6	13.3
1974	5.0	1,185	5.9	7.1	—	7.1	13.0
1975	5.0	975	4.9	7.1	.3	7.3	12.2
1976	5.3	1,000	5.3	7.4	(¹)	7.4	12.7
1977	7.2	1,000	7.2	7.0	(¹)	6.7	13.9
1978	6.1	1,120	6.8	7.9	.8	8.7	15.5
1979	4.8	1,135	5.4	8.2	2.7	10.9	16.3
1980	3.9	935	3.6	6.0	3.3	9.3	12.9
1981	4.1	1,250	5.1	5.7	2.6	8.3	13.2
1982 ²	4.4	1,050	4.6			8.7	13.3
Kentucky-Tennessee fire-cured, types 22-23							
Disappearance		Average price per pound	Price support level	Placed under loan			
Total	Domestic	Exports		Quantity	Percentage of crop		
Million pounds				Cents	Million pounds	Percent	
Virginia fire-cured, type 21							
Disappearance		Average price per pound	Price support level	Quantity	Million pounds	Percent	
Total	Domestic	Exports		Cents	Million pounds	Percent	
Kentucky-Tennessee fire-cured, types 22-23							
1973	39.9	15.7	24.2	71.7	53.5	.2	.7
1974	30.3	14.5	15.8	93.4	58.2	.7	2.7
1975	30.7	12.2	18.5	104.7	65.2	.1	.4
1976	34.6	11.2	23.4	142.4	74.1	(¹)	—
1977	35.4	17.4	18.0	132.3	79.5	1.1	2.4
1978	37.3	15.1	22.2	112.5	84.6	11.3	22.2
1979	36.7	18.0	18.7	115.2	90.3	11.4	28.8
1980	37.5	19.7	17.8	121.9	98.9	2.1	6.4
1981	³ 30.0	³ 12.0	³ 18.0	161.1	111.0	1.0	2.8
1982					123.0		
Virginia fire-cured, type 21							
Disappearance		Average price per pound	Price support level	Quantity	Million pounds	Percent	
Total	Domestic	Exports		Cents	Million pounds	Percent	
Kentucky-Tennessee fire-cured, types 22-23							
1973	6.2	1.7	4.5	75.5	53.5	(¹)	—
1974	5.7	.7	5.0	81.7	58.2	.3	4.5
1975	4.8	1.4	3.4	93.0	65.2	(¹)	.9
1976	6.1	³ 2.0	4.1	118.0	74.1	.1	1.5
1977	5.2	2.8	2.4	96.2	79.5	1.0	14.4
1978	4.6	1.0	3.6	94.5	84.6	1.8	26.2
1979	7.0	3.2	3.8	107.9	90.3	.9	16.3
1980	4.6	2.6	2.0	127.4	98.9	.3	7.2
1981	³ 4.5	³ 2.0	³ 2.5	131.2	111.0	.2	4.8
1982					123.0		

¹Less than 50,000 pounds. ²Estimated, projected crop. ³Estimated. ⁴Includes 400,000 pounds fire loss, December 1976.

**Table 14—Dark air-cured tobacco, types 35-36, and Sun-cured tobacco type 37:
Acreage, yield, production, carryover, supply, disappearance, season
average price, and price support operations, 1973-82**

(Farm-sales weight)

Marketing year beginning Oct. 1	Acreage harvested	Yield per acre	Production	Beginning stocks			Total supply
				Manufacturers and other	Under loan	Total	
<i>Thousand acres</i>							
				<i>Pounds</i>			
				<i>Million pounds</i>			
Dark air-cured, types 35-36							
1973	7.6	1,647	12.4	31.9	12.8	44.7	57.1
1974	7.0	1,653	11.6	31.4	5.5	36.9	48.5
1975	8.0	1,750	14.0	32.7	(¹)	32.9	46.9
1976	9.3	1,660	15.1	28.2	—	28.2	43.3
1977	11.2	1,809	20.4	26.1	—	26.1	46.5
1978	11.2	1,969	22.2	30.4	(¹)	30.4	52.6
1979	9.7	1,665	16.1	30.0	4.1	34.1	50.2
1980	9.3	1,745	16.2	28.6	5.6	34.2	50.4
1981	9.7	1,614	15.7	29.6	6.8	36.4	52.1
1982 ²	9.0	1,700	15.3			37.1	52.4
Sun-cured, type 37							
1973	.7	1,320	.9	3.2	0	3.2	4.1
1974	.7	1,315	.9	3.0	0	3.0	3.9
1975	.7	930	.7	2.3	0	2.3	3.0
1976	.7	1,115	.8	2.1	0	2.1	2.9
1977	.8	1,030	.8	1.8	0	1.8	2.6
1978	.7	1,205	.9	1.8	0	1.8	2.7
1979	.5	1,055	.6	2.2	0	2.2	2.8
1980	.4	1,010	.4	2.0	0	2.0	2.4
1981	.5	1,320	.7	1.6	0	1.6	2.5
1982 ²	.7	1,050	.7	1.7	0	1.7	2.4
Disappearance							
				Average price per pound	Price support level	Placed under loan	
	Total	Domestic	Exports			Quantity	Percentage of crop
<i>Million pounds</i>							
Cents							
Dark air-cured, types 35-36							
1973	20.2	17.4	2.8	61.9	47.6	(¹)	.2
1974	15.6	12.8	2.8	76.9	51.8	.4	3.7
1975	18.7	16.1	2.6	89.8	58.0	.1	.5
1976	17.2	15.1	2.1	116.6	65.9	(¹)	—
1977	16.1	13.6	2.4	117.7	70.7	(¹)	—
1978	18.4	15.7	2.7	99.1	75.2	4.3	19.7
1979	16.0	14.2	1.8	111.7	80.4	2.2	13.7
1980	13.9	11.6	2.3	126.5	88.0	1.4	8.6
1981	³ 15.0	³ 13.0	³ 2.0	133.1	98.7	1.5	9.3
1982					109.4		
Sun-cured, type 37							
1973	1.1	.9	.2	69.2	47.6	0	—
1974	1.6	1.3	.3	82.1	51.8	⁴ 13	1.4
1975	.9	.7	.2	85.5	58.9	0	—
1976	1.1	.9	.2	105.0	65.9	0	—
1977	.8	.6	.1	100.0	70.7	⁴ 13	1.6
1978	.5	.3	.2	88.8	75.2	⁴ 109	12.4
1979	.8	.6	.2	90.8	80.4	⁴ 30	5.2
1980	.8	.7	.1	127.1	88.0	0	0
1981	³ 6	³ 5	³ 1	131.7	98.7	4	.6
1982					109.4		

¹Less than 50,000 pounds. ²Estimated, projected crop. ³Estimated. ⁴Quantity placed under loan in thousands of pounds.

Table 15—Cigar tobacco, types 41-62: Domestic supplies, disappearance, and season average prices, 1973-82

(Farm-sales weight)

Crop year ¹	Acreage harvested	Yield per acre	Supply		Disappearance			Average price per pound to growers
			Production	Beginning stocks ¹	Total supply	Total	Domestic	
Thousand acres	Pounds	Million pounds					Cents	
Pennsylvania Seedleaf								
1973	13.0	1,700	22.1	53.7	75.8	28.3	27.5	.8
1974	13.0	2,000	26.0	47.5	73.5	24.3	24.0	.3
1975	12.0	1,650	19.8	49.2	69.0	22.2	21.8	.4
1976	13.5	1,750	23.6	46.8	70.4	20.7	20.3	.4
1977	13.5	1,940	26.2	49.7	75.9	21.8	21.6	.2
1978	13.0	1,940	25.2	54.1	79.3	23.6	23.5	.1
1979	11.2	1,580	17.7	55.7	73.4	24.3	24.0	.3
1980	13.0	1,900	24.7	49.1	73.8	21.7	21.2	.5
1981 ²	13.3	2,050	27.3	52.1	79.4	23.0	22.8	.2
1982 ³	13.5	1,750	23.6	56.4	80.0			80.0
Ohio, Miami, Valley Filler (types 42-44)								
1973	2.2	1,420	3.1	6.8	9.9	4.0	4.0	—
1974	2.0	1,530	3.1	5.9	9.0	3.1	3.1	—
1975	2.1	1,620	3.4	5.9	9.3	3.6	3.6	—
1976	2.2	1,550	3.4	5.7	9.1	3.1	3.1	—
1977	1.8	2,025	3.6	6.0	9.6	2.6	2.6	—
1978	1.6	1,850	3.0	7.0	10.0	3.7	3.7	—
1979	1.3	1,500	2.0	6.3	8.3	4.5	4.5	—
1980	1.4	1,700	2.4	3.8	6.2	4.1	4.1	—
1981 ²	1.7	1,440	2.4	2.1	4.5	4.0	4.0	—
1982 ³	1.9	1,700	3.2	.5	3.7			105.0
Puerto Rico Filler (type 46) ⁴								
1973	4.5	1,435	6.5	9.2	15.7	5.7	5.7	—
1974	2.7	1,477	3.9	10.0	14.0	7.9	7.9	—
1975	2.7	1,500	4.3	6.1	10.4	3.2	3.2	—
1976	2.8	1,429	4.1	7.2	11.3	4.9	4.9	—
1977	2.6	1,480	3.9	6.4	10.3	3.9	3.9	—
1978	2.2	1,400	3.1	6.4	9.5	2.6	2.6	—
1979	2.0	1,000	2.0	6.9	8.9	.8	.8	—
1980	1.1	1,380	1.5	8.1	9.6	1.6	1.6	—
1981 ²	1.1	1,380	1.5	8.0	9.5	2.5	2.5	—
1982 ³	1.0	1,400	1.4	7.0	8.4			86.0
Total Cigar Filler (types 41-46)								
1972	21.0	1,293	27.2	89.9	117.1	47.4	47.1	.3
1973	19.7	1,450	31.7	69.7	101.4	38.0	37.2	.8
1974	17.7	1,870	33.1	63.4	96.5	35.3	35.0	.3
1975	16.8	1,687	27.5	61.2	88.5	28.8	28.4	.4
1976	18.5	1,681	33.1	59.7	90.2	28.1	27.7	.4
1977	17.9	1,883	33.7	62.1	95.8	28.3	27.0	.3
1978	16.8	1,863	31.3	67.5	98.8	29.9	29.8	.1
1979	14.5	1,475	21.7	68.9	90.6	29.6	29.3	.3
1980	15.5	1,845	28.6	61.0	90.6	27.5	27.0	.5
1981 ²	16.1	1,938	31.2	62.1	93.4	29.5	29.3	.2
1982 ³	16.4	1,720	28.2	63.9	92.1			82.2
Connecticut Valley Binder (types 51-52)								
1973	1.6	1,721	2.7	7.5	10.2	3.2	3.1	.1
1974	1.5	1,737	2.5	7.0	9.5	3.3	3.1	.2
1975	1.5	1,582	2.4	6.2	8.6	4.3	4.1	.2
1976	1.5	1,605	2.4	4.3	6.7	2.4	2.3	.1
1977	1.4	1,784	2.5	4.3	6.8	1.9	1.9	*
1978	1.5	1,734	2.6	4.9	7.5	2.1	2.0	.1
1979	1.5	1,637	2.4	5.5	7.9	2.2	2.0	.2
1980	1.5	1,750	2.6	5.7	8.3	2.2	2.0	.2
1981 ²	1.7	1,998	3.5	6.1	9.6	3.0	2.8	.2
1982 ³	1.6	1,700	2.7	6.6	9.3			182.1

See footnotes at end of table.

Table 15—Cigar tobacco, types 41-62: Domestic supplies, disappearance, and season average prices, 1973-82 Continued

(Farm-sales weight)

Crop year ¹	Acreage harvested	Yield per acre	Supply		Disappearance			Average price per pound to growers
			Production	Beginning stocks ¹	Total supply	Total	Domestic	
Thousand acres	Pounds		Million pounds					Cents
Southern Wisconsin Binder (type 54)								
1973	4.9	1,950	9.6	19.4	29.0	10.1	10.1	—
1974	4.7	2,060	9.7	18.9	28.6	8.8	8.8	—
1975	5.6	1,945	10.9	19.8	30.7	7.5	7.5	—
1976	5.6	1,890	10.6	23.2	33.8	10.0	10.0	—
1977	6.2	2,020	12.5	23.8	36.3	10.2	10.2	—
1978	6.2	1,800	11.2	26.0	37.2	11.4	11.4	—
1979	6.3	2,080	13.1	25.8	38.9	—	—	—
1980	6.3	2,110	13.3	(5)	—	—	—	—
1981 ²	6.3	2,025	12.8	(5)	—			125.0
1982 ³	5.1	1,950	9.9					113.0
Northern Wisconsin Binder (type 55)								
1973	5.3	1,775	9.4	19.5	28.9	12.0	12.0	*
1974	4.7	1,870	8.8	16.9	25.7	9.9	9.9	*
1975	5.4	1,835	9.9	15.8	25.7	9.7	9.6	.1
1976	5.5	1,750	9.6	16.0	25.6	9.4	9.4	—
1977	5.8	2,045	11.9	16.2	28.1	9.1	9.1	.1
1978	5.9	1,550	9.1	19.1	28.2	8.9	8.9	.1
1979	6.6	1,810	11.9	19.3	31.2	—	—	.1
1980	6.6	1,920	12.6	(5)	—	—	—	*
1981 ²	7.1	1,875	13.3	(5)	—			125.0
1982 ³	6.5	1,850	12.0					108.0
Total Wisconsin Binder (types 54-55)								
1973	10.2	1,859	19.0	38.9	57.9	22.2	22.2	*
1974	9.4	1,965	18.5	35.8	54.3	18.7	18.7	*
1975	11.0	1,891	20.8	35.6	56.4	17.2	17.1	.1
1976	11.1	1,821	20.2	39.2	59.4	19.4	19.4	—
1977	12.0	2,032	24.4	40.0	64.4	19.3	19.3	.1
1978	12.1	1,678	20.3	45.1	65.4	20.1	20.1	*
1979	12.9	1,942	25.0	45.3	70.3	22.0	22.0	*
1980	12.9	2,013	26.0	48.9	74.9	18.5	18.5	*
1981	13.4	1,946	26.1	55.7	81.8	18.0	18.0	*
1982 ³	11.6	1,900	22.0	63.8	85.8			110.4
Total Cigar Binder (types 51-55)								
1973	11.8	1,841	21.7	46.4	68.1	25.4	25.3	.1
1974	10.9	1,934	21.0	42.8	63.8	22.0	21.8	.2
1975	12.5	1,851	23.2	41.8	65.0	21.5	21.2	.3
1976	12.6	1,795	22.6	43.5	66.1	21.8	21.6	.2
1977	13.4	2,007	26.8	44.3	71.1	21.1	21.1	.1
1978	13.6	1,684	22.9	50.0	72.9	22.2	22.2	.1
1979	14.4	1,911	27.5	50.8	78.3	24.2	24.0	.2
1980	14.4	1,985	28.6	54.6	83.2	20.7	20.5	.2
1981 ²	15.1	1,952	29.6	61.8	91.4	21.0	20.8	.2
1982 ³	13.2	1,885	24.9	70.4	95.3			118.9
Connecticut Valley Shade-grown (type 61)								
1973	5.0	1,210	6.1	10.7	16.8	8.3	6.4	1.9
1974	4.8	1,625	7.8	8.5	16.3	6.8	2.8	3.9
1975	4.4	1,371	6.0	9.5	15.5	8.0	4.2	3.8
1976	4.2	1,555	6.6	7.5	14.1	5.2	1.8	3.4
1977	3.3	1,544	5.1	8.9	14.0	4.7	.5	4.2
1978	2.7	1,392	3.8	9.3	13.1	5.0	.1	4.9
1979	2.7	1,472	4.0	8.1	12.1	5.4	.5	4.9
1980	3.0	1,513	4.5	6.8	11.3	5.9	2.3	3.6
1981 ²	2.6	1,592	4.1	5.3	9.4	5.8	4.6	1.2
1982 ³	1.2	1,500	1.8	3.6	5.4			1000.0

See footnotes at end of table.

Table 15—Cigar tobacco, types 41-62: Domestic supplies, disappearance, and season average prices, 1973-82 Continued

(Farm-sales weight)

Crop year ¹	Acreage harvested	Yield per acre	Supply			Disappearance			Average price per pound to growers
			Production	Beginning stocks ¹	Total supply	Total	Domestic	Exports	
Thousand acres	Pounds	Million pounds					Cents		
Total Shade-grown (types 61-62) ⁶									
1973	7.6	1,280	9.8	17.7	27.5	12.5	10.1	2.4	452.2
1974	6.6	1,652	11.0	15.0	26.0	10.4	6.0	4.4	536.1
1975	5.5	1,409	7.7	15.7	23.4	9.8	5.6	4.2	585.7
1976	4.6	1,565	7.2	13.6	20.8	7.7	3.8	3.8	528.2
1977	3.4	1,547	5.3	13.1	18.4	5.8	1.0	4.8	591.4
1978	2.7	1,392	3.8	12.7	16.5	6.3	1.0	5.3	750.0
1979	2.7	1,472	4.0	10.2	14.2	6.5	1.1	5.4	850.0
1980	3.0	1,513	4.5	7.8	12.3	6.1	2.2	3.9	980.0
1981 ²	2.6	1,592	4.1	6.2	10.2	6.1	4.6	1.5	1000.0
1982 ³	1.2	1,500	1.8	4.1	5.9				
Grand Total Cigar Tobacco (types 41-62)									
1973	39.1	1,627	63.2	133.8	197.0	75.9	72.6	3.3	116.1
1974	35.2	1,848	65.1	121.2	186.3	67.7	62.8	4.9	142.5
1975	34.8	1,678	58.4	118.6	177.1	60.3	55.4	4.9	135.1
1976	35.7	1,709	61.0	116.8	177.7	58.2	53.7	4.4	121.4
1977	34.7	1,900	65.9	119.5	185.4	55.2	50.0	5.2	114.9
1978	33.1	1,752	58.0	130.1	188.2	58.6	53.2	5.5	122.1
1979	31.6	1,684	53.2	129.9	183.1	59.7	53.8	5.9	156.4
1980	32.9	1,875	61.7	123.4	185.1	55.0	50.4	4.6	175.3
1981 ²	35.5	1,828	64.9	130.0	195.0	56.6	54.7	1.9	161.8
1982 ³	30.8	1,782	54.9	138.4	193.3				

¹October 1 for types 41-55; July 1 for types 61-62. ²Estimated disappearance. ³Estimated carryover, projected crop. ⁴Puerto Rican planting occurs late in calendar year. 1981 production and price are estimated, price per pound excludes payment by Puerto Rican Government. ⁵Not available. ⁶Includes Georgia-Florida shade-grown, type 62 which has not been grown since 1978. April 1, 1982, stocks were 0.5 million pounds. *Less than 50,000 pounds.

Table 16—Cash receipts from tobacco as percentage of cash receipts from crops and all farm commodities, by State, 1978-81

State	1978		1979		1980 ¹		1981 ¹	
	Tobacco	Percentage of total receipts	Tobacco	Percentage of total receipts	Tobacco	Percentage of total receipts	Tobacco	Percentage of total receipts
	Million	Percent	Million	Percent	Million	Percent	Million	Percent
North Carolina	1,106	34.2	894	26.3	1,113	30.2	1,296	31.1
Kentucky	565	26.5	549	26.7	675	30.2	766	27.7
South Carolina	206	20.1	173	16.3	175	17.3	240	20.7
Virginia	188	14.6	159	11.8	159	12.0	243	14.1
Tennessee	178	11.2	156	8.8	184	10.1	252	13.2
Georgia	177	6.8	147	5.0	153	5.4	191	6.1
Florida	31	.9	30	.8	30	.8	41	1.0
Maryland	34	4.1	38	4.3	30	3.5	43	4.2
Connecticut	23	9.9	26	10.2	27	10.1	35	11.0
Wisconsin	20	.5	22	.5	29	.6	30	.6
Ohio	23	.7	22	.6	29	.8	29	.8
Indiana	20	.5	17	.4	27	.6	31	.7
Massachusetts	9	3.6	8	3.3	11	4.0	15	5.0
Pennsylvania	14	.6	15	.6	16	.6	19	.7
Missouri	6	.2	9	.2	9	.2	11	.3
West Virginia	3	2.0	3	1.2	3	1.5	6	2.3
United States	2,606	2.3	2,271	1.7	2,672	1.9	3,250	2.3

¹Subject to revision. ²U.S. total receipts from tobacco include relatively small receipts for a few States not shown separately.

Table 17—Tobacco manufacturing corporations: Net sales, net income, and profit ratios, 1972-81

Period	Net income			Profit			
	Net sales	Before income taxes	After income taxes	Per dollar of sales		Percentage of stockholders equity (annual basis)	
				Before Federal tax	After Federal tax	Before Federal tax	After Federal tax
	<i>Million dollars</i>				<i>Cents</i>		<i>Percent</i>
1972	11,308	1,246	676	11.1	6.0	28.4	15.4
1973	12,205	1,254	704	10.3	5.8	26.4	14.8
1974	14,267	1,354	770	9.5	5.4	¹ 26.4	¹ 15.0
1974 ²	8,933	1,053	801	11.8	9.0	¹ 26.4	¹ 20.0
1975	9,987	1,396	919	14.0	9.2	26.6	16.6
1976	11,964	1,638	1,011	14.3	7.8	28.8	15.9
1977	13,696	1,938	1,239	14.2	9.1	32.0	17.5
1978	15,493	2,591	1,461	16.7	9.4	32.4	18.3
1979	³ 15,331	2,740	1,752	17.9	11.4	30.9	19.2
1980	³ 17,471	3,027	2,044	17.3	11.7	31.0	19.8
1981	³ 20,228	3,560	2,221	17.6	11.0	30.8	19.2
Quarterly 1981							
1	4,622	857	580	18.5	12.5	31.2	21.2
2	5,193	858	541	16.5	10.4	30.4	19.2
3	5,154	906	557	17.6	10.8	30.6	18.3
4	5,259	939	543	17.9	10.3	31.0	17.9

¹Estimated on the basis of an equity increase of 8 percent. ²Industry classification changed and foreign subsidiary results omitted beginning with 1974. For 1974, the new series reduced net sales 37 percent and profits before taxes 22 percent. Profits after taxes increased 4 percent. ³Excludes excise taxes.

Note: Includes non-tobacco enterprises of tobacco manufacturing corporations. Compiled from the Quarterly Financial Reports for Manufacturing Corporations. Federal Trade Commission—Securities and Exchange Commission.

Table 18--United States exports of unmanufactured tobacco by types, to principal importing countries crop years, 1980/81 and 1981/82. 1/

Importing country	Part year			Importing country	Part year			
	1980-81		through April		1980-81		through April	
	1980-81	1981-82 2/			1980-81	1981-82 2/		
Million pounds								
<u>Flue-cured, types 11-14</u>								
United Kingdom	32.2	29.8	24.7	Switzerland	93	90	60	
West Germany	51.4	41.9	38.8	Norway	701	174	62	
Japan	58.2	58.2	68.2	Sweden	291	216	30	
Netherlands	20.3	18.2	11.1	West Germany	101	35	15	
Thailand	14.8	11.7	18.9	Other countries	472	112	21	
Australia	9.2	8.1	7.7	Total	658	628	133	
Italy	15.5	14.2	14.9					
Sweden	7.5	7.5	4.0					
Norway	2.7	2.4	2.4					
Finland	6.1	5.4	5.4					
Denmark	7.3	7.2	7.3	Bahamas	0	0	0	
Ireland	2.2	2.2	3.0	Zaire	0	0	0	
Belgium-Luxembourg	5.6	4.5	4.4	Other countries	0	0	0	
Switzerland	8.6	7.5	6.4	Total	0	0	0	
Republic of Korea	0	0	10.9					
Philippines	6.8	4.4	4.2					
Spain	24.9	18.3	23.0					
Malaysia	7.2	6.6	7.4					
Taiwan	13.2	13.2	19.4	United Kingdom	40	20	0	
Egypt	10.9	7.9	1.4	Benin (Dahomey)	0	0	0	
Other countries	56.5	44.9	38.9	Zaire	0	0	0	
Total	361.0	314.2	321.0	Other countries	0	0	0	
<u>Burley, type 31</u>								
Italy	11.5	5.3	6.9	Total	40	20	0	
Sweden	2.1	.8	.5					
Denmark	.8	.4	1.0					
Netherlands	8.2	.5	.1					
Japan	13.6	13.6	17.3					
West Germany	19.2	4.3	4.9					
Switzerland	5.0	.8	5.5					
United Kingdom	.6	0	.3					
Thailand	3.6	1.6	8.5					
Philippines	3.3	1.8	2.2					
Other countries	12.3	6.3	16.0					
Total	73.0	35.5	63.2					
<u>Maryland, type 32</u>								
Belgium-Luxembourg	.6	.5	.6	Total	185	157	5	
West Germany	1.3	.7	.4					
Switzerland	3.9	1.3	1.5					
Other countries	.8	.4	.6					
Total	6.6	2.8	3.0					
<u>Ky.-Tenn. fire cured, types 22-23</u>								
Sweden	.4	.4	.2					
Netherlands	9.6	4.7	5.2					
Belgium-Luxembourg	.5	.1	.1					
France	2.0	1.5	.8					
Switzerland	.2	.2	.4					
Other countries	2.7	1.2	1.0					
Total	15.4	8.2	7.8					
<u>Stem, Trimmings, and Scrap 2/</u>								
Sweden	4.5	4.5	1.7					
Denmark	1.0	.3	3.7					
United Kingdom	8.7	6.5	2.8					
West Germany	12.2	7.9	7.7					
Japan	24.0	22.6	27.4					
Other countries	28.7	18.9	14.3					
Total	79.1	60.7	57.6					

Detail may not add to total due to rounding.
Compiled from publications and records of the Bureau of the Census.

1/ July-June crop year for flue-cured, and cigar wrapper;
October-September crop for all other types. 2/ Subject to
revision. 3/ Less than 50,000 pounds.

Table 19—Imported foreign-grown cigarette leaf stocks, by quarters, 1973-82¹

Year	Jan. 1	April 1	July 1	Oct. 1	Jan. 1	April 1	July 1	Oct. 1
<i>Million pounds</i>								
	Foreign-grown flue-cured				Foreign-grown oriental and aromatic			
1973	31	31	40	38	369	376	387	360
1974	38	44	47	54	355	374	383	350
1975	53	49	70	70	377	412	415	380
1976	74	73	72	101	361	431	416	405
1977	100	102	109	117	397	365	362	347
1978	117	120	130	132	344	364	345	295
1979	132	133	147	157	326	359	366	350
1980	153	148	166	166	343	342	367	336
1981	152	140	161	167	316	332	324	320
1982	152	141			337	395		
	Foreign-grown burley				Total imported cigarette leaf			
1973	17	24	27	36	418	431	455	434
1974	49	59	67	88	442	477	497	493
1975	118	107	145	136	548	567	623	587
1976	134	124	132	141	568	628	619	646
1977	139	132	127	138	637	599	598	602
1978	140	136	150	174	601	619	625	601
1979	172	163	171	188	630	655	684	696
1980	187	192	213	216	683	683	746	719
1981	208	211	244	265	676	684	729	752
1982	272	263			760	799		

¹Farm sales weight.

Table 20—Unmanufactured Tobacco, exports by district ports 1980-1981

Custom district	Unmanufactured, tobacco	
	1980	1981 ¹
<i>Million dollars</i>		
Norfolk, Virginia	646.0	552.4
Wilmington, North Carolina	387.1	641.7
New York, New York	55.4	5.7
Baltimore, Maryland	107.4	120.1
Miami, Florida	10.8	12.0
San Francisco, California	.1	1.7
Charleston, South Carolina	39.1	1.1
New Orleans, Louisiana	25.4	28.4
Los Angeles, California	13.4	13.2
San Juan, Puerto Rico	20.6	31.0
Other	28.8	50.2
Total	1,334.1	1,457.5

¹Subject to revision.

Totals may not add due to rounding. Compiled from reports of Bureau of the Census.

Table 21—Agricultural and tobacco export value, percentage distribution and percent of total, by State, fiscal years 1973 and 1981¹

Tobacco type and State	Export value				Tobacco as percentage of agricultural ²		State as percentage of total tobacco ³	
	Tobacco ²		Agricultural		1973	1981	1973	1981
	1973	1981	1973	1981				
<i>Million dollars</i>								
Flue-cured								
North Carolina	338	710	526	1,220	64	58	53	53
South Carolina	66	118	174	332	38	36	10	9
Georgia	59	104	207	562	28	19	9	8
Virginia	49	90	120	278	41	32	8	7
Florida	16	19	184	617	9	3	3	1
Subtotal	528	1,041	1,210	3,009	44	35	83	78
Burley and fire-cured								
Kentucky	64	179	186	607	34	29	10	13
Tennessee	23	53	175	436	13	12	4	4
Subtotal	87	232	361	1,043	24	22	14	17
Other								
Connecticut	6	17	8	18	75	94	1	1
Maryland	10	18	59	199	18	9	1	1
Massachusetts	2	8	6	19	42	42	(4)	1
Ohio	2	8	432	1,633	1	(4)	(4)	1
All other ⁵	5	14	1,701	5,434	(4)	(4)	1	1
Total 18 States	640	1,338	3,774	9,486	17	14	100	100

¹Year ending June 30 (1973). Year ending September 30, 1981. ²Unmanufactured and bulk smoking tobacco. ³Computed from unrounded totals.

⁴Less than .5 percent. ⁵Pennsylvania, West Virginia, Alabama, Indiana, Wisconsin, Louisiana and Missouri.

Compiled from: Tontz, Robert and McCall, Thomasine, U.S. Agricultural Export Shares by States, Fiscal year 1976," and FOREIGN AGRICULTURAL TRADE OF THE UNITED STATES, March/April 1982, pp. 65-75.

Detail may not add to total due to rounding.

STATISTICAL SUMMARY

Item	Unit or	1981		1982		Last data as
	base	April	May	March	April	percentage of
	period					a year earlier
Average price at auctions	:	:	:	:	:	:
Flue-cured	:	Ct. per lb.	Closed	Closed	Closed	:
Burley	:	Ct. per lb.	Closed	Closed	Closed	:
Maryland	:	Ct. per lb.	171.0	165.0	176.0	175.0
Virginia fire-cured	:	Ct. per lb.	Closed	Closed	Closed	Closed
Ky.-Tenn. fire-cured	:	Ct. per lb.	Closed	Closed	159.0	Closed
Ky.-Tenn. dark air-cured	:	Ct. per lb.	Closed	Closed	Closed	Closed
Virginia sun-cured	:	Ct. per lb.	Closed	Closed	Closed	Closed
Price support level 1/	:	:	:	:	:	:
Flue-cured	:	Ct. per lb.	158.7		175.9	:
Burley	:	Ct. per lb.	163.6		181.3	:
Virginia fire-cured	:	Ct. per lb.	111.0		123.0	:
Ky.-Tenn. fire-cured	:	Ct. per lb.	111.0		123.0	:
Ky.-Tenn. dark air-cured	:	Ct. per lb.	98.7		109.4	:
Virginia sun-cured	:	Ct. per lb.	98.7		109.4	:
Connecticut Valley cigar binder	:	Ct. per lb.	113.3		125.5	:
Wis. binder and Ohio filler	:	Ct. per lb.	81.8		90.7	:
Puerto Rican filler	:	Ct. per lb.	84.9		94.1	:
Parity index 2/	:	1910-14=100	1,031	1,033	1,067	1,066
Industrial production index 3/	:	1967=100	151.9	152.7	141.5	140.7
Employment	:	Mil.	100.9	101.0	99.5	99.3
Personal income 4/	:	Bil. dol.	2,353.8	2,367.4	2,522.5	2,531.1
Taxable removals	:					:
Cigarettes	:	Bil.	54.2	53.7	52.9	57.4
Cigars and cigarillos	:	Mil.	351.8	301.9	276.5	328.2
Accumulated from Jan. 1	:					:
Cigarettes	:	Bil.	158.7	212.4	101.1	158.5
Cigars and cigarillos	:	Mil.	922.9	1,224.8	542.1	870.3
Invoiced to domestic customers	:					:
Accumulated from Jan. 1	:					:
Smoking tobacco	:	Mil. lb.	7.2			6.9
Chewing tobacco 14/	:	Mil. lb.	21.1			20.4 14/
Snuff 14/	:	Mil. lb.	6.0			10.2 14/
Tax-exempt removals	:					:
Cigarettes	:	Bil.	7.6	6.9	15.0	7.6
Exports	:	Bil.	8.5	6.0	8.1	7.3
Cigars and cigarillos	:	Mil.	16.5	11.7	10.3	17.2
Accumulated from Jan. 1	:					:
Cigarettes	:	Bil.	26.7	33.6	22.5	30.1
Exports	:	Bil.	23.8	29.8	14.6	21.9
Cigars and cigarillos	:	Mil.	38.3	50.1	19.4	36.6
Invoiced for export	:					:
Accumulated from Jan. 1	:					:
Smoking tobacco	:	Mil. lb.	.2			.2
Chewing tobacco	:	Mil. lb.	*			*
Producer price indexes 5/	:					:
Tobacco products	:	1967=100	255.4	268.4	306.4	306.5
Cigarettes (filtertip, king size)	:	1967=100	257.0	272.8	311.6	311.6
Cigars	:	1967=100	163.9	165.3	175.3	175.3
Smoking tobacco	:	1967=100	287.3	287.3	327.6	327.6
Plug chewing tobacco	:	1967=100	338.4	352.1	375.4	375.4
Snuff	:	1967=100	326.1	---	354.0	354.0
Consumer price indexes (urban)	:					:
Tobacco products	:	1967=100	212.5	213.3	230.7	234.1
Cigarettes	:	1967=100	214.8	215.5	233.6	237.3
Other tobacco products 6/	:	Dec. 1977=100	128.0	129.6	136.8	138.1
Imports of tobacco (for consumption)	:					:
Cigarette leaf	:	Mil. lb.	23.5	15.4	10.8	13.3
Cigar tobacco (leaf and scrap)	:	Mil. lb.	4.2	3.6	3.1	3.1
Other tobacco (leaf and scrap)	:	Mil. lb.	7.1	5.5	2.0	9.0
Accumulated from Jan. 1	:					:
Cigarette leaf	:	Mil. lb.	85.2	100.6	33.5	46.8
Cigar tobacco (leaf and scrap)	:	Mil. lb.	14.3	17.9	7.2	10.3
Other scrap and tobacco NSPF 7/	:	Mil. lb.	24.2	29.8	13.6	22.5

See footnotes at end of table.

STATISTICAL SUMMARY--CONTINUED

Item	Unit or base period	1981		1982		Last data as percentage of a year earlier
		March	April	February	March	
Exports of leaf tobacco (farm-sales weight)						
Flue-cured	Mil. lb.	33.4	38.0	31.0	35.6	26.7 : 70
Burley	Mil. lb.	21.3	17.2	16.2	32.1	21.7 : 126
Maryland	Mil. lb.	.7	.3	.2	.6	.1 : 33
Virginia fire- & sun-cured	Mil. lb.	*	.1	.1	.4	.7 : 700
Ky.-Tenn. fire-cured	Mil. lb.	1.7	2.9	1.0	1.7	1.4 : 48
Ky.-Tenn. dark air-cured	Mil. lb.	.1	.3	.1	.1	.7 : 233
Cigar wrapper	Mil. lb.	.3	.1	.1	*	.2 : 200
Cigar binder	Mil. lb.	*	.0	*	*	.0 : 0
Accumulated from beginning of marketing year <u>8/</u>						
Flue-cured	Mil. lb.	404.6	442.6	392.6	428.2	454.9 : 103
Burley	Mil. lb.	34.7	51.9	32.2	64.2	86.0 : 166
Maryland	Mil. lb.	3.4	3.7	3.4	3.9	4.0 : 108
Virginia fire- & sun-cured	Mil. lb.	.7	.9	.7	1.0	1.7 : 189
Ky.-Tenn. fire-cured <u>9/</u>	Mil. lb.	6.7	9.0	5.8	7.5	8.5 : 94
Ky.-Tenn. dark air-cured <u>9/</u>	Mil. lb.	1.3	2.2	.7	.8	1.9 : 86
Cigar wrapper	Mil. lb.	2.9	3.0	1.1	1.1	1.3 : 43
Cigar binder	Mil. lb.	.1	.1	.1	*	.1 : 100
Cigar filler	Mil. lb.	.3	.4	.1	.1	.1 : 25
Exports of manufactured tobacco in bulk and not elsewhere classified <u>10/</u>	Mil. lb.	1.3	1.4	.8	.8	1.5 : 107
Accumulated from Jan. 1	Mil. lb.	2.2	3.6	3.0	3.8	5.3 : 147
		Quarterly data				
		1981		1982		
Stocks of tobacco--1st of quarter (farm-sales weight) <u>11/</u>		Jan-Mar	April-June	Jan-Mar	April-June	
Domestic types						
Flue-cured	Mil. lb.	2,520	2,231	2,588	2,254	101
Burley	Mil. lb.	1,299	1,297	1,366	1,426	110
Maryland	Mil. lb.	33	27	37	40	148
Fire-cured	Mil. lb.	76	92	67	96	104
Dark air- and sun-cured	Mil. lb.	41	46	41	47	102
Cigar filler	Mil. lb.	56	73	58	68	93
Cigar binder	Mil. lb.	52	71	58	76	107
Cigar wrapper	Mil. lb.	7	6	6	5	83
Under Government loan <u>12/</u>	Mil. lb.	752	710	578		77
Foreign types						
Cigarette and smoking	Mil. lb.	676	678	760	799	118
Oriental	Mil. lb.	316	326	337	395	121
Flue-cured	Mil. lb.	152	140	152	141	101
Burley	Mil. lb.	208	211	272	263	125
Cigar	Mil. lb.	87	91	94	93	102
Tobacco outlets <u>13/</u>						
Seasonally adjusted data, annual rates, for charts, p. 2						
Cigarettes						
Production	Bil.	755.0	711.3	723.6	719.5	101
Tax-paid removals	Bil.	626.0	624.0	625.2	623.5	100
Cigar production						
Large	Bil.	4.14	4.00	4.06	3.90	98
Small	Bil.	1.42	1.53	1.30	1.28	84
Smoking production	Mil. lb.	30.5	29.1	28.0	30.8	106
Chewing production						
Loose leaf	Mil. lb.	70.8	74.9	73.8	71.6	96
Plug and other	Mil. lb.	37.1	38.6	35.8	34.0	88
Snuff production	Mil. lb.	26.3	27.0	29.0	27.9	103
Exports of leaf						
Total	Mil. lb.	569.2	416.0	691.0	627.0	151
Flue-cured	Mil. lb.	476.1	569.0	410.0	488.0	86

1/ 1981 and 1982 crops, respectively. 2/ Prices paid by farmers including interest, taxes and wage rates. 3/ Seasonally adjusted. 4/ Seasonally adjusted, annual rate. 5/ Federal and applicable state and local taxes included. 6/ Includes tobacco accessories. 7/ Farm-sales weight equivalent. 8/ July 1 for flue-cured and cigar wrapper and October 1 for others. 9/ Includes Black Fat. 10/ Smoking tobacco in bulk through December 1977. Beginning January 1978 blended strips no longer included. 11/ Holdings of manufacturers and dealers, including grower cooperatives. 12/ Reported by grower cooperatives. 13/ Latest quarter is estimated. *Less than 50,000 pounds. **Estimated. Detail may not add due to rounding. 14/ New product classification.

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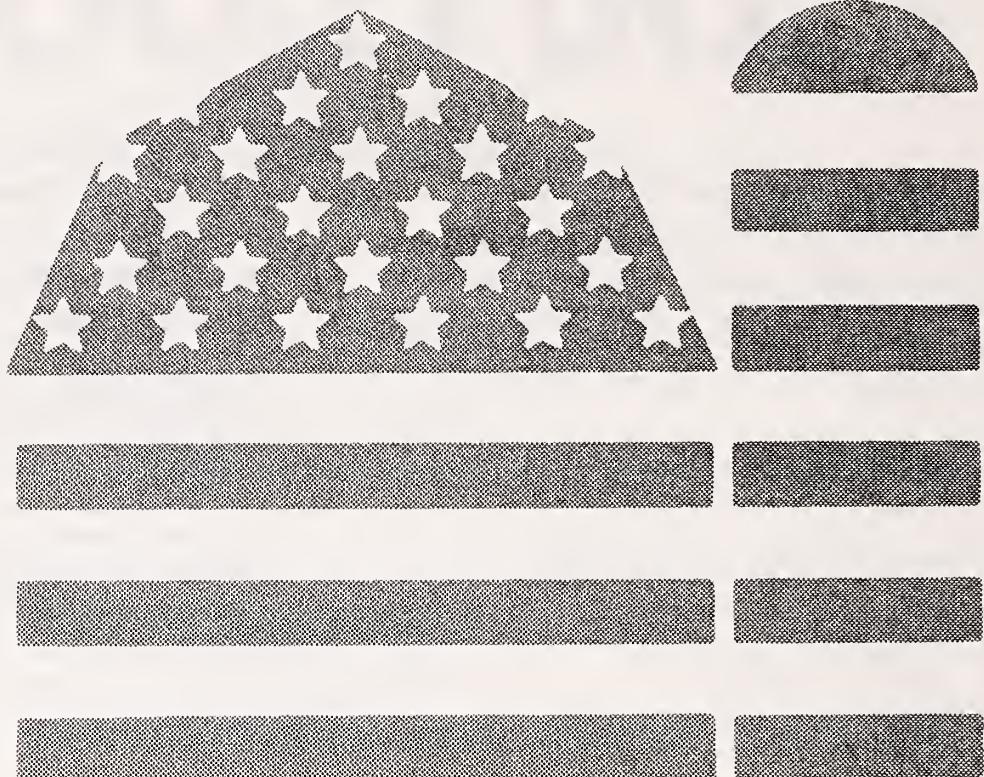
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